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AUTHOR Rubin, Stanford E.; Farley, Roy C.
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ABSTRACT

This guide is the participant workbook for the first in a series of instructor-assisted training modules for rehabilitation counselors, supervisors, and graduate students. This workbook for the first module focuses on basic intake interviewing skills consisting of: (1) systematic interview programming including attracting, planning and structuring; (2) information exchange during the intake process including collection and dissemination effectiveness; and (3) information exchange via verbal and nonverbal interaction. The materials contain worksheets, outlines for each session, practice exercises, self-assessment checklists and suggested interview topics for use during each training session. Space for note taking is provided as well as a bibliography of recommended readings. (MCF)

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Advanced Facilitative Case Management Series

Training Package I

Intake Interview Skills for Rehabilitation Counselors

A Participant's Workbook

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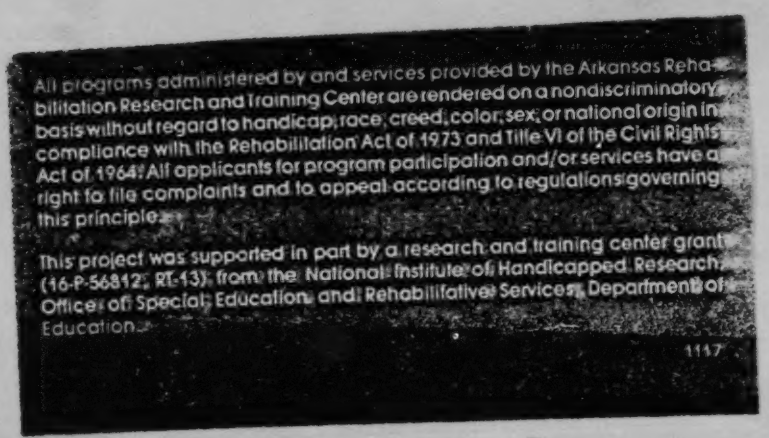
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Section I

Preface

Preface

Intake Interview Skills for Rehabilitation Counselors: A Participant's Workbook.

What is it?

This Manual contains all of the forms and training aids that would typically be distributed by the trainer during the training session. It includes material needed for the various training exercises that will be done during the session and provides space for note taking.

Intake Interview Skills for Rehabilitation Counselors: A Participant's Workbook.

What is its purpose?

1. To provide a record of the training session experience for you to take with you.
2. To help you organize the information you will be getting and make note taking easier.
3. To provide you with information and response forms you will need in training.

Intake Interview Skills for Rehabilitation Counselors: A Participant's Workbook.

How do I use it?

The trainer will direct you as to what page to turn to as material is presented and training exercises are performed.

The workbook is yours. Use it to facilitate your learning of intake interview skills.

Intake Interview Skills Training for Rehabilitation Counselors:

The Process.

The training approach used during this training session is based on a model that requires the trainer to tell ⟶ demonstrate ⟶ elicit action ⟶ summarize ⟶ assess, which draws on the learning models of learning by listening, learning by observing, and learning by doing. This will require you to listen ⟶ watch ⟶ discuss ⟶ do ⟶ assess.

The components of the training will be covered utilizing the following outline, as appropriate:

I. Definition
II. Rationale
III. Objectives
IV. Guidelines
V. Demonstration of Non-Facilitative Techniques*
VI. Results of Non-Facilitative Techniques*
VII. Demonstration of Facilitative Techniques
VIII. Results of Facilitative Techniques
IX. Discrimination Exercises
X. Practice
XI. Summary

*The demonstration of Facilitative and Non-Facilitative Techniques involves the demonstration of multiple counselor behaviors although the focus will be on one specific technique at a time.

Group Discussion

Group discussion is an integral element in the success of the training session. Learning will be facilitated by you freely expressing your reactions, ideas, etc.

Have A Learning Experience!

Section II

Introduction to Intake Interview Skills for Rehabilitation Counselors

Interviews
Major Types and Examples

Type 1 – The focus is on _____.

Examples include

Type 2 – The focus is on _____.

Examples include

The Rehabilitation Counseling Intake Interview is an example of type_____where the major focus is on _____.

Objectives of The Rehabilitation Intake Interview Skills Training Package

Information Awareness Matrix

	Information Known to Counselor	Information Not Known to Counselor
Information Known to Client	**Known Dimension**	**Hidden Dimension (Collection Area)**
Information Not Known to Client	**Blind Dimension (Dissemination Area)**	**Unknown Dimension (Both Collection & Dissemination)**

Known Dimension - Information known by _____.

Blind Dimension - Information known by _____,

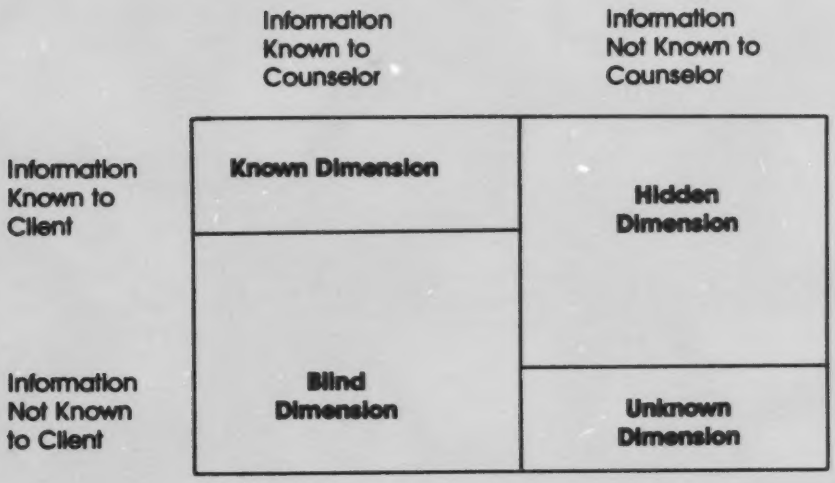
but not by _____.

Hidden Dimension - Information known by _____,

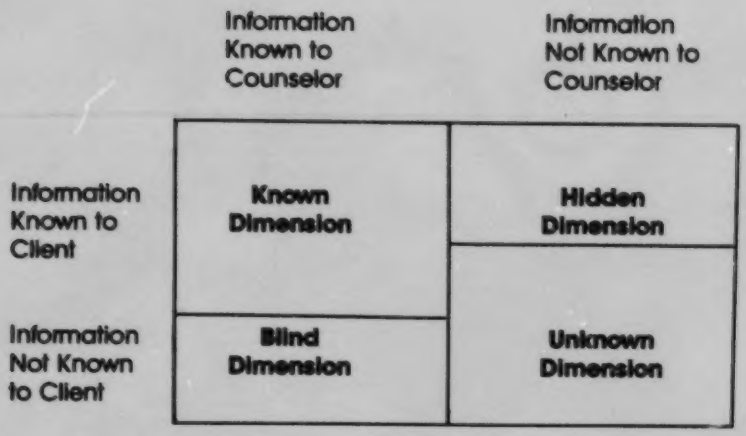
but not by _____.

Unknown Dimension - Information not known by _____.

Information Distribution at Initiation of Client/Counselor Interaction



Information Distribution Following Effective Information Exchange



Decreasing the client's blind dimension: This is achieved through effective _____.

Decreasing the hidden dimension: This is achieved through effective _____.

Decreasing the unknown dimension: This is achieved through _____.

Interacting

Three basic ways of interacting with others:

1.
2.
3.

1. Playing games is an example of _____ interaction.
2. Talking about the weather is an example of _____.
3. Helping others obtain desired objectives is an example of _____ interaction.

Do **Not** Make The Intake Interview A Game.
Do **Not** Make The Intake Interview A Sociable Conversation.
Do Make The Intake Interview Helpful Interaction.

Overview of the Training Components

I. Systematic Interview Programming

Step 1. Attracting the client
Step 2. Planning the interview
Step 3. Structuring the interview setting

II. Information Exchange Effectiveness

Step 1. Information dissemination
Step 2. Information collection

III. Non-Verbal Interaction Techniques

Step 1. Positioning
Step 2. Observing
Step 3. Listening

IV. Verbal Responding

Step 1. Moment-to-moment responses

A. Continue
B. Restricted-Focus
C. Exploratory-Focus
D. Check
E. Declarative
F. Self-Expressive

Step 2. Interaction styles within the interview

A. The Listener
B. The Interrogator
C. The Explorer
D. The Reflector
E. The Declarer
F. The Self-Expresser

Section III

Systematic Interview Programming

Systematic Interview Programming

Definition of Systematic Interview Programming

Major steps in programming an interview include:

1. Attracting the client
2. Planning the interview
3. Structuring the interview setting

The Importance of Systematic Interview Programming

There is an infinite variety of "Wrong" ways to conduct an interview and only a few "Right" ways.

Systematic Interview Programming enhances your chances of employing "Right" strategies and conducting an interview the "Right" way.

Objectives of Systematic Interview Programming Training

1. Learn how to motivate the client to appear for an interview.
2. Learn how to plan an interview.
3. Learn how to structure the interview setting to insure the effective exchange of information.

Step I - Attracting the Client

Definition of Attracting Actions

Importance of Attracting Actions

Objectives of Attracting Training

Guidelines for Effective Attracting

1. Decide on your mode of communication.
2. Decide to whom the invitation will be extended.
3. Be sure the person knows exactly **who** the interview is with.
4. Inform the person of **what** will happen.
5. Inform the person of **where** the interview will take place.
6. Inform the person of **how** to get to the interview.
7. Inform the person of **when** the interview will take place.
8. Inform the person of the general purpose or the **why** of the interview.
9. Present the person with a personal reason to appear.
10. Some referrals may need extra encouragement.
11. Obtain a personal commitment from the client.
12. Follow-up if necessary.

Other Guidelines

13.
14.
15.
16.
17.

Attracting

Exercise 1

Mr./Mrs./Miss/ Sam Jones has an appointment with John Smith

at 10:00 am/pm on July 6

Please be on time.

John Smith
State Rehab Agency
1621 So. Oak Drive
Terrytown, CA

1. Is all the information that answers the who, what, when, where and how included in the appointment slip?
   A. Who is the client to see?
   B. What kind of interview is it?
   C. When is the interview?
   D. Where is the interview?
   E. How will client get to interview?
2. Is the general purpose of the interview described?
3. Have the specific benefits of the appointment for the client been identified?
4. What might be the consequences or results of this kind of attracting action?
5. What can be done to improve the attracting actions of this interview?

Group Reactions:

Attracting

Exercise 2

Name: Mr. Sam Jones **Today's Date:** June 16, 1980

Appointment: initial individual screening interview

Purpose: to talk about your interests and how the rehab agency might be of service to you.

Appointment Date: Thursday, July 6, 1980 **Time:** 10:00a.m.

With: Mr. John Smith, State Rehab Agency

Location: State Rehab Agency
1621 So. Oak Drive
Terrytown, CA
Phone: 511-3232

My office is on the 3rd floor, room 116. The receptionist will direct you to my office when you arrive. Enclosed is a map outlining the best route to the building.

Note: Mr. Jones, I understand you have been referred to us by Jack Daily of the Mimy Clinic. He informs me you are interested in the kinds of services we might provide to eligible persons. I will look forward to seeing you and discussing with you what we might be able to do. Call me if you have any questions.

1. Is all the information that answers the who, what, when, where and how included in the appointment slip?
   - A. Who is the client to see?
   - B. What kind of interview is it?
   - C. When is the interview?
   - D. Where is the interview?
   - E. How will the client get to the interview?
2. Is the general purpose of the interview described?
3. Have the specific benefits of the appointment for the client been identified?
4. What might be the consequences or results of this kind of attracting action?
5. What can be done to improve the attracting actions of this interviewer?

Group Reactions:

Attracting

Exercise 3

Below is a brief sketch of a client. Assume that this client has been set up to see you for an initial interview two weeks from now. Write an invitation for an appointment to the client.

Joan Jackson is a 17 year old female. She is in special education at the local high school. She was referred to your agency/organization by the high school counselor, Mr. Sam Little. Someone called for an appointment and your receptionist made one for her at 8:30 a.m. two weeks from today.

Summary of Attracting

1. Attracting action may seem like such a simple skill that it need not be addressed. But remember, there are many "no shows" for interviews.
2. Attracting will maximize the possibility that the client will "show" for the interview.
3. Inform the client of the who, what, when, where, how, and why of the interview.
4. Add a personal note to communicate the possible benefits of the interview for the client.
5. Watch your "no shows" decrease.

Attracting the Client Self-Assessment Check List

When making an appointment for a person to come for an interview, I perform the following behaviors. . .

Yes	No	N/A	
____	____	____	1. Consider carefully the mode of communication (whether phone, written, or in person) that is most appropriate for the person being invited.
____	____	____	2. Consider carefully to whom the invitation is extended (interviewee, parents, guardian, spouse, etc.).
____	____	____	3. Make sure the person knows exactly **who** the interview is with. I identify myself and my agency/organization clearly.
____	____	____	4. Inform the person of **what** will happen. I state the type of interview the person is being requested to come for (i. e. this is an initial screening interview).
____	____	____	5. Inform the person of **where** the interview will take place. I am very precise in stating the interview location.
____	____	____	6. Inform the person of **how** to get to the interview. I give precise directions of how to get to my location.
____	____	____	7. Inform the person of **when** the interview will take place. Time and date are included in the invitation.
____	____	____	8. Inform the person of the general purpose or the **why** of the interview. I state exactly why the person is being extended an invitation (i.e. "To talk about how this agency may help you.").
____	____	____	9. Encourage the person to appear by presenting a personal reason. I stress the benefits or advantages to the person of attending the interview.
____	____	____	10. Follow-up. I remind the person of the interview just before the scheduled date.

Step II - Planning the Interview

Definition of Planning

Three types of objectives include:

1. General
2. Specific
3. Moment-to-moment

Examples of General Objectives for the Initial Interview

1. Establish Rapport.
2. Determine appropriateness of referral.
3. Obtain client expectations and identify needs.
4. Complete necessary interview forms.
5. Describe your and your agency's purpose.

Examples of Specific Objectives for the Initial Interview

1. Explore client's history of previous suicide attempts.
2. Give client information about a known interest he/she has.
3. Complete forms that are specific for the client.

Examples of Moment-to-Moment Objectives in an Initial Interview

1. Exploration of client's fear of work.
2. Exploration of client's hostility toward authority figures.
3. Exploration of the joys client finds in some event.

The Importance of Planning

Objectives of Interview Planning Training

Guidelines for Effective Planning

1. Develop a general "game plan" which will guide your activities no matter what client is being interviewed.
2. Develop specific objectives for each client as appropriate.
3. Allow your pre-interview objectives to be moderated by moment-to-moment objectives that develop during the intake interview.
4. Do not become so involved in the content of forms that you miss what is really being communicated. Be aware of what is happening with the client and respond appropriately.
5. Develop interview objectives and strategies in written form. Do not rely on your memory for all topics that should be discussed.
6. Review objectives prior to the client contact.
7. Inform the client of the interview objectives.
8. Be flexible!! Do not rigidly and inflexibly impose your "game plan" on the client.

Other Guidelines

9.
10.
11.

General Objectives for a "Game Plan"

A. What are my objectives for this interview?

B. What information does the client need from me to achieve those objectives?

C. What information do I need from the client to achieve those objectives?

D. What is the most efficient and effective way to collect and disseminate that information?

General Objectives for a "Game Plan" Further Defined

A. What are my objectives for this interview?

1. Determine appropriateness of referral.
2. Establish rapport.
3. Complete intake interview forms.

B. What information does the client need from me to achieve those objectives?

1. Counselor's role and function.
2. Description of agency and its role and function.
3. Client's rights and responsibilities.
4. Confidentiality.

C. What information do I need from the client to achieve those objectives?

1. Referral source.
2. Reason for referral.
3. Client's expectations.
4. Client's feelings about being referred.
5. Information necessary to complete forms.

D. What is the most efficient and effective way to collect and disseminate that information?

1. Ask client to complete part of intake interview form as appropriate.
2. Give client a lot of freedom and expression.
3. Ask open-ended instead of closed-ended questions.
4. Attend to and respond to client's feelings.
5. Talk at client's level of comprehension.
6. Be a good listener.

Planning

Exercise 1

1. Did the counselor appear to have a systematic interview plan?

2. What do you think his objectives were?

3. What topics were discussed?

4. Was each topic discussed in depth?

5. Did he inform the client of his objectives?

6. Did the counselor respond more to the forms or to the client?

7. Was he flexible?

8. What were the counselor's strong points?

9. In what areas was he weak? List mistakes in effective planning:

10. How would you describe the counselor/client relationship at this point?

11. What would you do differently during this interview?

Planning
Exercise 2

1. Did the counselor appear to have a systematic interview plan?

2. What do you think his objectives were?

3. What topics were discussed?

4. Was each topic discussed in depth?

5. Did he inform the client of his objectives?

6. Did the counselor respond more to the forms or to the client?

7. Was he flexible?

8. What were the counselor's strong points?

9. In what areas was he weak? List mistakes in effective planning:

10. How would you describe the counselor/client relationship at this point?

11. What would you do differently during this interview?

Planning

Exercise 3

List objectives you would want to achieve with every client during the initial interview.

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Exercise 4

List major topics you would want to discuss with every client during the initial interview in order to achieve the objectives you have listed above. Place them under the heading "Information to Give to Client" and "Information to Get from Client."

Information to Give to Client	Information to Get from Client
1.	1.
2.	2.
3.	3.
4.	4.
5.	5.
6.	6.
7.	7.
8.	8.
9.	9.
10.	10.

Exercise 5

What is the most effective and efficient way to exchange information and achieve my objectives?

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

Planning the Interview Self-Assessment Check List

I Perform the following behaviors. . .

Yes	No	N/A	
____	____	____	1. Develop a general "game plan" which guides my activities during the interview.
____	____	____	2. Have a systematic format which I follow when developing my general "game plan".
____	____	____	3. When formulating my plan, I focus both on the content of the interview, such as topics that need to be discussed, and process or how I will go about discussing those topics.
____	____	____	4. Develop specific objectives for the client.
____	____	____	5. Develop my interview objectives and strategies in written form.
____	____	____	6. Review those objectives prior to the interview.
____	____	____	7. Inform the client of the interview objectives.
____	____	____	8. Allow my general and specific pre-interview objectives to be moderated by moment-to-moment objectives that develop during the course of the interview.
____	____	____	9. Do not become so involved in the content of forms that I miss what is really being communicated during the interview. I am aware of what is happening with the client and respond appropriately.
____	____	____	10. Am flexible. I do not rigidly and inflexibly impose my "game plan" on the client.

Step III - Structuring The Interview Setting

Definition of Structuring

Importance of Structuring

Objectives of Structuring Training

Guidelines for Structuring the Interview Setting

1. Arrange furniture so as not to have physical barriers between you and the client. Place chairs opposite each other.
2. Whenever possible have chairs of same or similar type and of equal height.
3. Assure that furniture is comfortable.
4. Control noise or distracting variables, phone calls, knocks at the door, outside noise, etc.
5. Provide a meeting place where confidentiality can be assured.
6. Put away things you do not wish the client to see.
7. Control temperature within the interview setting.
8. Control lighting within the interview setting.
9. Be sure the interview setting is accessible.
10. Structure the interview time.

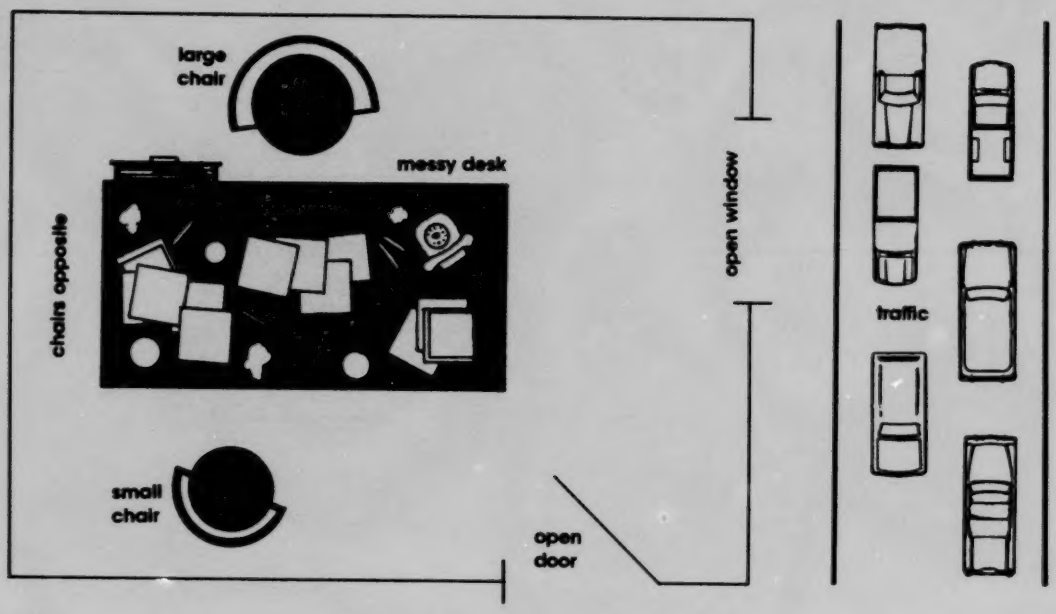
Other Guidelines

11.
12.
13.
14.

Structuring

Exercise 1

Below is an interview room where you will be meeting a client for an initial interview. List the things that might be done to prepare the room to facilitate an effective exchange of information.

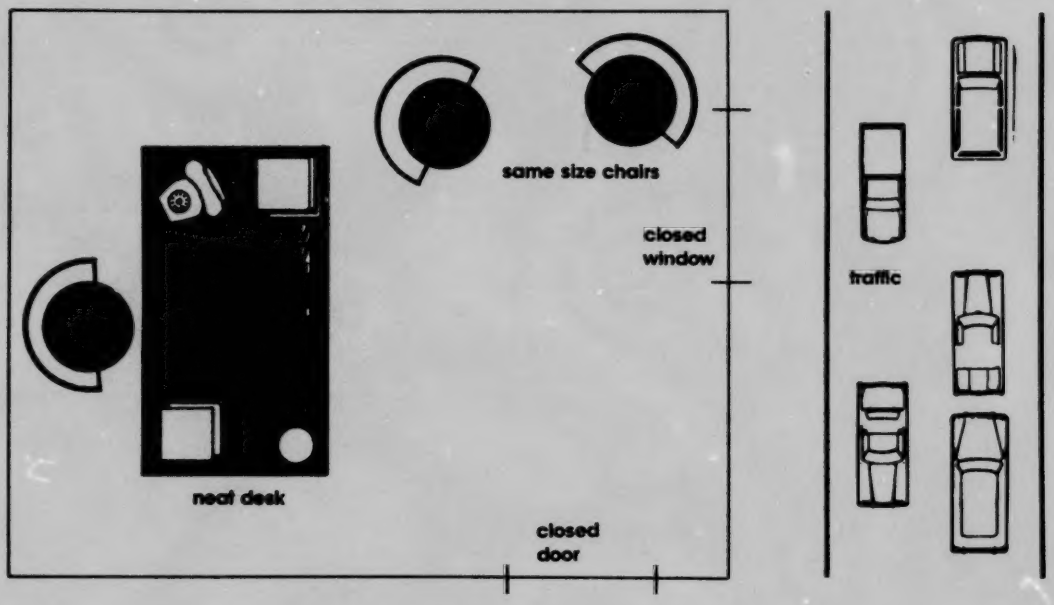


1.
2.
3.
4.
5.

Structuring

Exercise 2

Below is an interview room that is prepared to receive clients. Compare and contrast this one with the room on page 32 of your workbook.



1.
2.
3.
4.
5.

Structuring
Exercise 3

1.

2.

3.

4.

5.

Structuring
Exercise 4

1.

2.

3.

4.

5.

Structuring
Exercise 5

List five things you can do to change or improve your present interview setting to make it more conducive to information exchange effectiveness.

1.

2.

3.

4.

5.

Structuring The Interview Setting

Self-Assessment Check List

Prior to an interview, I perform the following behaviors. . .

Yes	No	N/A	
_____	_____	_____	1. Arrange furniture so as not to have physical barriers between me and the person I'm interviewing.
_____	_____	_____	2. Have chairs of same or similar type and of equal height.
_____	_____	_____	3. Make sure the furniture is as comfortable as possible.
_____	_____	_____	4. Control noise or distracting variables such as phone calls, knocks at the door, outside noise, etc.
_____	_____	_____	5. Provide a meeting place where confidentiality can be assured.
_____	_____	_____	6. Put away things I do not wish the person to see.
_____	_____	_____	7. Control temperature within the interview setting.
_____	_____	_____	8. Control lighting within the interview setting.
_____	_____	_____	9. Make sure the interview setting is accessible.
_____	_____	_____	10. Structure the interview time so that sufficient time is allowed to achieve my objectives.

Systematic Interview Programming

1) Attracting the Client

Mode of communication
To Whom
Whom the interview is with
What will happen
Where the interview is
How to get there
When the interview is
Why or purpose of interview
Personal reason to come
Follow-up

2) Planning the Interview

General "game plan"
Systematic format
Content & process
Specific objectives
Written plan
Review
Inform Client
Moment-to-moment objectives
Client-Focus vs Form Focus
Flexible

3) Structuring the Interview Setting

Barriers
Chairs
Distracting variables
Confidentiality
Neatness
Temperature
Lighting
Accessibility
Time

Systematic Interview Programming Format

1. What are my objectives for this interview?
2. What information does the interviewee need from me to achieve those objectives?
3. What information do I need from the interviewee to achieve those objectives?
4. What is the most effective and efficient way to exchange that information?
   A) Attract the interviewee in a facilitative manner so that he/she comes to the interview with a positive attitude.
   B) Carry out all the guidelines for effective planning.
   C) Structure the interview setting making it conducive to the exchange of information.

Section IV

Information Exchange During the Intake Interview

Information Exchange

Purpose of Section IV

1. Learn the importance of information dissemination.
2. Learn the types of information helpful to clients during the intake interview.
3. Learn an effective style of disseminating information.
4. Learn the types of information necessary to collect from the client during the intake interview.
5. Learn an effective information collection style.

Definition of Information Exchange

Importance of Information Exchange

Objectives of Information Exchange

Step I - Information Dissemination

Definition of Information Dissemination

Major Information Dissemination Categories

Role & function of Rehab. Agency
Role & function of Rehab. Counselor
Client Rights
Client Responsibilities

Importance of Information Dissemination

Objectives of Information Dissemination Training

Summary Of Meeting With Dr. Fairface

Dr. Fairface appeared to be an extremely efficient and intelligent person. He literally whisked me through the interview. He used a lot of words I did not understand, but I was afraid to ask him what he meant as I didn't want to appear stupid. What bothered me the most was that he kept referring to me as being in "refraction status" - I gotta look that up when I get home. Although Dr. Fairface was quite friendly he wasn't a real human kind of person. That was kind of a relief though, him being an analyst and all. I was a little concerned that he would put me on the couch and start asking about my sex life. After talking to him I'm not sure he is a regular kind of analyst. It may just be some type of title. On the other hand he did ask a lot of questions that you wouldn't ask just anyone. Things like my financial situation, relationships with my family, boss, what my interests were and all. I may have told him some things I shouldn't have about my finances. I'm in trouble if he is affiliated with IRS.

He told me what his agency, The Government Employees Restoration and Growth Agency, was about in general terms. He said basically their goal was to get professional government people into situations where they can make their greatest contribution and more fully realize their intellectual, emotional, and physical potential. That sounds fine, but I'm not real sure what he means in more practical terms. He more or less suggested that this was a voluntary type of thing–didn't come right out and say it–but then he told me he had made an appointment for me with the State Health and Fitness Department for a complete work-up. I guess I will go along with him for a while until I can find out just how much influence this guy has.

He covered some of the things it was possible for him to provide for me if I am selected, based on his work-up of my profile. He talked about being able to place me in a profession most suited to my talents and being able to provide education to that end. I'm not sure if he meant a short-course, night school, or what. He also mentioned "supportive services" such as encounter groups, a jogging program, and health foods and their contribution to overall effectiveness and independence. I think he is a health food nut.

Basically those are the main points I got out of it. I may have missed some things as I was kind of up-tight about the whole thing. He said he hoped we would have more time the next meeting and he would answer my questions. I really need to make a list.

List any questions or reactions you might have had as a result of your first meeting with Dr. Fairface.

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.
11.
12.

Guidelines for Effective Information Dissemination During the Intake Interview

1. Explain the purpose of the rehabilitation agency.
2. Explain the eligibility criteria for your rehabilitation agency services.
3. Provide the client with a general picture of the services that might be available to an eligible client from the rehabilitation agency.
4. Explain why the person was referred to the rehabilitation agency if appropriate.
5. Explain your role as an arranger and/or coordinator of services.
6. Explain your role as a direct provider of services (e.g., personal counseling, joint vocational planning).
7. Explain your role as a client advocate.
8. Explain your role as a member of a treatment team.
9. Provide the clients with information on the confidential nature of the counselor/client relationship.
10. Provide clients with information regarding their rights (e.g., 1) right to appeal, 2) right to administrative review, 3) civil rights).
11. Ensure that client has a general understanding (what, why, when, where, how) of those actions and responsibilities required of them during the early part of the rehabilitation process (e.g., 1) general medical exam, 2) specialist exam, 3) work evaluation).
12. Explain the contents of any form the client is asked to sign.
13. Summarize the significant content of the intake interview discussion as the interview approaches its end.
14. Ensure that information dissemination is a vehicle for promoting client independence and client involvement.
15. Communicate information to the client at the client's level of understanding.
16. Avoid presenting the client with too much information at "one shot" in the interview.
17. Present information to clients during the intake interview in a timely fashion.
18. Do not rely solely on a standardized information dissemination vehicle.
19. Make sure that the client has understood the information provided.

Other Guidelines

20.

21.

22.

Information Dissemination Assessment Form

Directions: The Information Dissemination Assessment Form includes topics which may be discussed during the initial rehabilitation counseling interview in categories I-IV. Use the form to check the topics you hear discussed with the client. Category V allows you to assess the manner in which information was disseminated. Place a check by each behavior you think was performed.

I. Role & Function of the Rehabilitation Agency

_____ 1. Purpose of agency
_____ 2. What the agency is not
_____ 3. Eligibility criteria
_____ 4. Fact that an eligibility decision will be made
_____ 5. Services provided
_____ 6. Objectives of certain services
_____ 7. Why the person was referred

II. Role & Function of the Rehabilitation Counselor

_____ 1. Arranger of services
_____ 2. Provider of services
_____ 3. Client advocate
_____ 4. Team member
_____ 5. Joint approach with client
_____ 6. Actions in specific situations
_____ 7. Lack of action in specific situations
_____ 8. Interview information utilization
_____ 9. External information utilization

III. Client Rights

_____ 1. Objectives of interview
_____ 2. Confidentiality
_____ 3. Right to appeal ineligibility
_____ 4. Appeal process
_____ 5. Right to administrative review of service dissatisfaction
_____ 6. Civil rights

IV. Client Responsibilities

_____ 1. Regarding general medical exam
_____ 2. Why exam is needed
_____ 3. What the exam consists of
_____ 4. Regarding specialist exam
_____ 5. What specialist exams are needed
_____ 6. Why specialist exams are needed
_____ 7. Explanation of forms
_____ 8. Why forms are to be signed
_____ 9. Responsibilities beyond eligibility determination
_____ 10. Specific responsibilities in relation to specific services beyond eligibility determination

V. Style

_____ 1. Communicated information at the client's level of understanding.
_____ 2. Avoided presenting too much information in "one shot."
_____ 3. Provided information in a well timed fashion.
_____ 4. Made sure client understood information provided.

Information Dissemination Effectiveness

Exercise 1

1. Did the counselor appear to have a systematic interview plan in regard to information dissemination?

2. How adequately did the counselor explain:
   A. His agency's role and function
   B. His role and function
   C. Client Rights
   D. Client Responsibilities

3. Was information disseminated in a manner that promoted client involvement and independence?

4. How appropriate was the counselor's language level when disseminating information?

5. How well timed was the information provided by the counselor?

6. Did the counselor avoid presenting too much information in "one shot"?

7. Did the counselor make sure the client understood the information provided?

8. How did the counselor's information dissemination affect the counselor/client relationship?

9. List the strong and weak points in regard to how the counselor handled this interview.

Strong Points	Weak Points

10. What might be the consequences of this type of information dissemination?

11. In what ways might you have handled this interview differently in regard to information dissemination?

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Information Dissemination Assessment Form

Directions: The Information Dissemination Assessment Form includes topics which may be discussed during the initial rehabilitation counseling interview in categories I-IV. Use the form to check the topics you hear discussed with the client. Category V allows you to assess the manner in which information was disseminated. Place a check by each behavior you think was performed.

I. Role & Function of the Rehabilitation Agency

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_____ 4. Fact that an eligibility decision will be made
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_____ 6. Objectives of certain services
_____ 7. Why the person was referred

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_____ 1. Arranger of services
_____ 2. Provider of services
_____ 3. Client advocate
_____ 4. Team member
_____ 5. Joint approach with client
_____ 6. Actions in specific situations
_____ 7. Lack of action in specific situations
_____ 8. Interview information utilization
_____ 9. External information utilization

III. Client Rights

_____ 1. Objectives of interview
_____ 2. Confidentiality
_____ 3. Right to appeal ineligibility
_____ 4. Appeal process
_____ 5. Right to administrative review of service dissatisfaction
_____ 6. Civil rights

IV. Client Responsibilities

_____ 1. Regarding general medical exam
_____ 2. Why exam is needed
_____ 3. What the exam consists of
_____ 4. Regarding specialist exam
_____ 5. What specialist exams are needed
_____ 6. Why specialist exams are needed
_____ 7. Explanation of forms
_____ 8. Why forms are to be signed
_____ 9. Responsibilities beyond eligibility determination
_____ 10. Specific responsibilities in relation to specific services beyond eligibility determination

V. Style

_____ 1. Communicated information at the client's level of understanding.
_____ 2. Avoided presenting too much information in "one shot."
_____ 3. Provided information in a well timed fashion.
_____ 4. Made sure client understood information provided.

Information Dissemination Effectiveness

Exercise 2

1. Did the counselor appear to have a systematic interview plan in regard to information dissemination?

2. How adequately did the counselor explain:
   A. His agency's role and function
   B. His role and function
   C. Client Rights
   D. Client Responsibilities

3. Was information disseminated in a manner that promoted client involvement and independence?

4. How appropriate was the counselor's language level when disseminating information?

5. How well timed was the information provided by the counselor?

6. Did the counselor avoid presenting too much information in "one shot"?

7. Did the counselor make sure the client understood the information provided?

8. How did the counselor's information dissemination affect the counselor/client relationship?

9. List the strong and weak points in regard to how the counselor handled this interview.

Strong Points	Weak Points

10. What might be the consequences of this type of information dissemination?

11. In what ways might you have handled this interview differently in regard to information dissemination?

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Information Dissemination Assessment Form

Directions: The Information Dissemination Assessment Form includes topics which may be discussed during the initial rehabilitation counseling interview in categories I-IV. Use the form to check the topics you hear discussed with the client. Category V allows you to assess the manner in which information was disseminated. Place a check by each behavior you think was performed.

I. Role & Function of the Rehabilitation Agency

_____ 1. Purpose of agency
_____ 2. What the agency is not
_____ 3. Eligibility criteria
_____ 4. Fact that an eligibility decision will be made
_____ 5. Services provided
_____ 6. Objectives of certain services
_____ 7. Why the person was referred

II. Role & Function of the Rehabilitation Counselor

_____ 1. Arranger of services
_____ 2. Provider of services
_____ 3. Client advocate
_____ 4. Team member
_____ 5. Joint approach with client
_____ 6. Actions in specific situations
_____ 7. Lack of action in specific situations
_____ 8. Interview information utilization
_____ 9. External information utilization

III. Client Rights

_____ 1. Objectives of interview
_____ 2. Confidentiality
_____ 3. Right to appeal ineligibility
_____ 4. Appeal process
_____ 5. Right to administrative review of service dissatisfaction
_____ 6. Civil rights

IV. Client Responsibilities

_____ 1. Regarding general medical exam
_____ 2. Why exam is needed
_____ 3. What the exam consists of
_____ 4. Regarding specialist exam
_____ 5. What specialist exams are needed
_____ 6. Why specialist exams are needed
_____ 7. Explanation of forms
_____ 8. Why forms are to be signed
_____ 9. Responsibilities beyond eligibility determination
_____ 10. Specific responsibilities in relation to specific services beyond eligibility determination

V. Style

_____ 1. Communicated information at the client's level of understanding.
_____ 2. Avoided presenting too much information in "one shot."
_____ 3. Provided information in a well timed fashion.
_____ 4. Made sure client understood information provided.

Possible Information Dissemination Topics to Discuss with Client

I. Role and Function of the Rehabilitation Agency

1. General statement about the purpose of rehabilitation.
2. Explanation of what makes a person eligible for vocational rehabilitation services.
3. Explanation that an eligibility decision must be made in client's case.
4. General statement about what the rehabilitation agency is.
5. General statement about what the rehabilitation agency is not.
6. Information on services that can be provided.
7. Information about the contribution of certain services to meeting objectives.
8. A statement about the referral process.
9. Feedback to client of any understanding of client's reaction to information about the role and function of the agency.

II. Role and Function of the Rehabilitation Counselor

1. Counselor's role as an arranger and/or coordinator of services.
2. Counselor's role as a direct provider of services.
3. Client advocacy role.
4. Role as a team member.
5. Joint approach with client.
6. Statements about what the counselor will do in specific situations.
7. Statements about what the counselor will not do in specific situations.
8. Statements about how the counselor will utilize information collected from client.
9. Statements about how the counselor will utilize information collected from external sources.
10. Feedback to client of any understanding of client's reaction to counselor's discussion of his role.

III. Client Rights

1. Statement about the importance of sharing information.
2. Statement about how information collected will be used.
3. Statement about confidentiality.
4. Explanations of client's right to appeal if found ineligible.
5. Explanation of the appeal process.
6. Explanation of client's civil rights.
7. Explanation of client's assistance projects if these are available to client.
8. Feedback to client of any understanding of his reaction to counselor's discussion of client's rights.

IV. Client Responsibilities

1. Explanation of what client needs to do to get general medical exam.
2. Explanation of why the general medical exam is needed.
3. Explanation of any requested client actions related to psychological examinations.
4. Explanation of other requested client actions.
5. General statement about client responsibilities throughout the rehabilitation process.
6. Statement of specific client responsibilities in relation to specific services.
7. Feedback to client of any understanding of client's reaction to information about his responsibilities.

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Review of Guidelines for Information Dissemination

In summary, the following information dissemination guidelines would be considered when disseminating information to the client during the intake and subsequent interviews.

1. Information should be provided to the client to promote client independence and to involve the client in the decision making process. Clients become better prepared to make appropriate decisions when they have sufficient information with which to make those decisions.

2. Specific information needed by the client might include:

   I. The role and function of your agency/organization/section

      A. What it is
      B. What it is not
      C. Eligibility criteria, if any
      D. Eligibility process
      E. Services provided
      F. Potential contribution of services for reaching objectives
      G. The referral process

   II. Your role and function

      A. As an arranger/coordinator of services
      B. As a direct provider of services
      C. As a client advocate
      D. As a team member

   III. Confidentiality

   IV. Client rights

      A. Client's right of appeal
      B. The appeal process
      C. Client's right to administrative review
      D. Civil rights

   V. Client responsibilities

3. The manner in which information is disseminated is important. Hence, judgement is called upon to consider such things as:

      A. Language level used
      B. Amount of information
      C. Timing of information
      D. Pre-programmed material

4. Finally, a summarization of the significant content of the interview discussion might prove helpful to both you and client.

Summary

Information Dissemination

What It Is:	Providing client with information or data that are not readily available to him/her.
What It Does:	Enhances client's decision making ability and facilitates effective joint program planning.
Why It Works:	Reduces the blind dimension of client's knowledge and facilitates positive relationship.
How To Do It:	Know the type of information needed by the client and provide it while attending to: Language used, amount given, timing, and presentation method.
When and Where To Do It:	Throughout your contact with client with special emphasis on the early phase and especially the initial interview.

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Information Dissemination Self-Assessment Form

In Categories I - IV, check the topics you usually discuss with each client during the intake interview. In Category V, check each behavior that describes the manner in which you disseminate information.

I. Role & Function of the Rehabilitation Agency

_____ 1. Purpose of agency
_____ 2. What the agency is not
_____ 3. Eligibility criteria
_____ 4. Fact than an eligibility decision will be made
_____ 5. Services provided
_____ 6. Objectives of certain services
_____ 7. Why the person was referred

II. My Role & Function

_____ 1. Arranger of services
_____ 2. Provider of services
_____ 3. Client advocate
_____ 4. Team member
_____ 5. Joint approach with client
_____ 6. Actions in specific situations
_____ 7. Lack of action in specific situations
_____ 8. Interview information utilization
_____ 9. External information utilization

III. Client Rights

_____ 1. Objectives of interview
_____ 2. Confidentiality
_____ 3. Right to appeal ineligibility
_____ 4. Appeal process
_____ 5. Right to administrative review of service dissatisfaction
_____ 6. Civil rights

IV. Client Responsibilities

_____ 1. Regarding general medical exam
_____ 2. Why exam is needed
_____ 3. What the exam consists of
_____ 4. Regarding specialist exams
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_____ 7. Explanation of forms
_____ 8. Why forms are to be signed
_____ 9. Responsibilities beyond eligibility determination
_____ 10. Specific responsibilities in relation to specific services beyond eligibility determination

V. Style

_____ 1. Communicated information at the client's level of understanding.
_____ 2. Avoided presenting too much information at "one shot."
_____ 3. Provided information in a well timed fashion.
_____ 4. Made sure client understood information provided.

A Study of Rehabilitation Counselor Information Dissemination Behavior (N=114)

I. Role And Function Of The Rehabilitation Agency

Percent		
46.50	1.	General statement about the purpose of the rehabilitation agency.
3.51	2.	General statement about what the rehabilitation agency is not.
22.81	3.	Explanation about what makes a person eligible for vocational rehabilitation services.
37.72	4.	Explanation that an eligibility decision must be made in client's case.
48.24	5.	Information on services that can be provided by the agency.
31.58	6.	Information regarding the specific objectives of certain services.
33.34	7.	A statement about why the person was referred to the agency.
14.04	8.	Did the counselor check to see if the information provided on the role and function of the rehabilitation agency was reasonably clear to the client?

II. Role And Function Of The Rehabilitation Counselor

Percent		
8.78	1.	Statement about counselor's role as an arranger and/or coordinator of services.
6.14	2.	Statement of counselor's role as a direct provider of services.
10.53	3.	Statement of counselor's role as a client advocate.
12.28	4.	Statement that counselor is member of a team, and others might be involved in decision making.
10.53	5.	Statement that counselor and client make many joint decisions.
40.35	6.	Statement about what counselor will do in specific situations.
10.53	7.	Statements about what counselor will not do in specific situations.
9.65	8.	Statements about how the counselor will utilize information collected in the interview.
29.83	9.	Statements about how information collected from external sources will be used.
0.00	10.	Did the counselor check to see if the information provided on role and function of the rehabilitation counselor was reasonably clear to the client?

III. Client Rights

Percent		
15.79	1.	A general statement regarding the objectives of the interview.
9.65	2.	Statement about confidentiality.
6.14	3.	Explanation of client's right to appeal if found ineligible.
.88	4.	Explanation of the appeal process.
9.65	5.	Explanation of client's right to administrative review if dissatisfied with services provided by the agency.
14.92	6.	Statement of client's civil rights.
.88	7.	Did counselor check to see if the information provided on client's rights was reasonably clear?

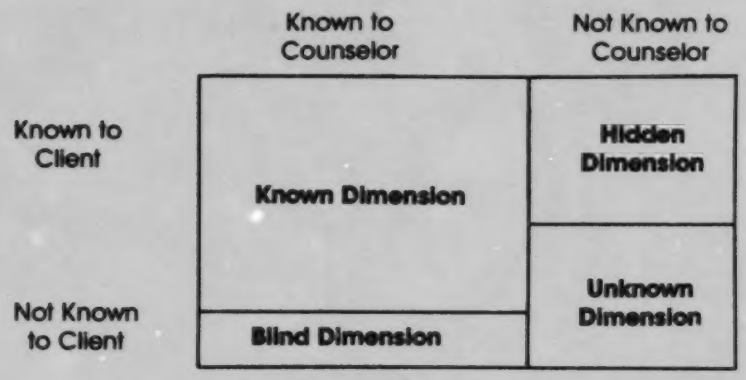
IV. Client Responsibilities

Percent		
40.35	1.	Explanation of client responsibilities regarding the general medical exam.
21.06	2.	Explanation of why general medical exam is needed.
6.14	3.	Explanation of what the general medical exam will consist.
21.93	4.	Explanation of client responsibilities regarding any medical specialist exams.
21.06	5.	Explanation of what specialist exams are needed.
11.41	6.	Explanation of why specialist exams are needed.
26.32	7.	Explanation of any form client may be asked to sign.
34.21	8.	Explanation of why client needs to sign any form.
13.16	9.	General statement about client responsibilities throughout rehabilitation process beyond eligibility determination.
11.41	10.	Statement of specific client responsibilities in relation to the provision of specific services after eligibility determination.
1.76	11.	Did the counselor check to see if the information provided on client responsibilities was reasonably clear?

Systematic Interview Programming Format

1. What are my objectives for this interview?
2. What information does the client need from me to achieve those objectives?
   A. Specific topics developed such as role and function of Rehab. agency, my role and function, client's rights and responsibilities, etc.
3. What information do I need from the client to achieve those objectives?
4. What is the most effective and efficient way to exchange that information?
   A. Attract the client in a facilitative manner so that he/she comes to the interview with a positive attitude.
   B. Carry out all the guidelines for effective planning.
   C. Structure the interview setting making it conducive to the exchange of information.
   D. When disseminating information attend to language level used, amount of information in one shot, timing, and client's comprehension of the information.

Relevant Information Awareness



Step II - Information Collection During the Intake Interview

Definition of Information Collection

The Importance of Effective Information Collection

Objectives of Information Collection Training

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Guidelines for Effective Information Collection During the Intake Interview

1. Be cognizant of what you want to achieve during the intake process.

Table 1

Program Development Information Needs

I. Physical Factors

Extent of Disability

1. How does the disability handicap employment potential?
2. Is the disability progressive or stable?
3. Can the client's functioning in activities of daily living be improved?
4. How much assistance in activities of daily living will the client always need?

Services

1. Which physical restoration services are needed to reduce the handicapping effects of the disability (e.g., surgery, orthotic and prosthetic devices, physical therapy, and occupational therapy)?
2. Can job modifications reduce the extent of the client's physical handicap for employment?

II. Psychosocial Factors

Psychological reaction to disability

1. To what degree has the client adjusted to the handicapping aspects of the disability?
   a. Does the client use "disability" as an excuse for failure?
   b. Are any physical symptoms psychologically based?
   c. Is the client excessively concerned with personal health?
   d. What secondary gains is the client receiving from remaining unemployed?

Vocation Self-concept

1. Does the client have a realistic perception of current
   a. strengths and weaknesses as a worker,
   b. potential for vocational skill development, and
   c. reasons for being unemployed?

Family and friends

1. What positive or negative role will the client's family and friends play in the rehabilitative process; e.g., be supportive, overprotective, or unrealistic regarding client potential?

Job acquisition

1. Can the client independently locate job openings?
2. Can the client satisfactorily fill out job application blanks?
3. Can the client make a good impression on an employer?

Job sustension

1. Can the client satisfactorily meet the demands of competitive work; e.g., accepting supervision, working independently, getting along with co-workers, and maintaining an adequate production rate?
2. Would the client's present use of leisure time adversely affect job retention?

Services

1. Which personal counseling, family counseling, work adjustment and/or placement services would be necessary; e.g., psychotherapy, work adjustment training, and job seeking skills training?

III. Educational-Vocational History Factors

Educational History

1. Which type of vocational training or jobs does the client's educational history suggest?
2. Are client vocational aspirations and educational history compatible?

Work history

1. What vocational skills does the client currently possess?
2. What vocational skills can the client develop that could limit the functional impact of the disability?
3. Has the client developed avocational skills that have vocational relevance?
4. Are client vocational goals consistent with current vocational interests?

Services

1. Which educational and vocational services are needed (e.g., remedial education and/or vocational training)?

IV. Economic Factors

Financial Considerations

1. Do disability-related financial benefits (SSI, SSDI, Medicaid, Workmen's Compensation) create disincentives to the client's rehabilitation?
2. Could current debts affect the completion of the client's rehabilitation program?
3. Can the client manage personal finances?
4. Does the client have sufficient financial support at present?

Services

1. What economic support will the client need during and after the rehabilitation program (e.g., SSI, Food Stamps, Low Rent Housing, etc.)?

Sources For The Above Information

1. The Counseling Interview
2. Medical Evaluation
3. Psychological Evaluation
4. Work Evaluation
5. Other

2. The majority of the social/vocational history can be obtained during the intake interview.

List topics that can be covered during the intake interview under each of the four major categories below:

I. Physical Factors

II. Psychosocial Factors

III. Educational-Vocational Skills Development

IV. Economic Factors

Table 2

A Topical Information Collection Guide for the Intake Interview

I. Physical Factors

1. What specific physical impairments are present?
2. What caused the disability?
3. How long has the client been disabled?
4. Has the client received any disability related treatment in the past (e.g., physical therapy, occupational therapy, prosthetics, or orthotics)?
5. Has the client's disabling condition become worse over the last year?
6. Is the client currently receiving any disability related treatment?
7. Is the client taking any medication with potential side effects?
8. Do any recent medical test results clarify extent of physical impairment?
9. How does the client's physical disability handicap daily functioning?

II. Psychosocial Factors

1. Personal Adjustment

a. Do recent psychological test results pertain to the question of client psychological adjustment?

b. Is there any agency or professional from whom the client is presently receiving psychological services?

c. Has the client ever received professional treatment for a personal adjustment problem?

d. Is the client taking any tranquilizers or sleeping pills?

e. Does the client report unnecessary avoidance of work and/or social situations since disabled?

2. Relationships with Family and Friends

a. What is the client's marital status?

b. Is the client living with his/her family?

c. Does the client have any dependent-age children?

d. Will the most significant family members (i.e., spouse) be supportive of the rehabilitation plan?

e. How does the client feel about his/her home environment?

f. How does the client get along with other members of the family?

g. Does the client have any close friends?

h. Is the client satisfied with his/her social life?

i. How does the client fill the hours of the day?

j. Would the client's family be willing to relocate geographically for him/her to acquire work?

III. Educational—Vocational Skills Development Factors

1. Educational History

a. How far did the client go in school?

b. What did the client like or dislike about school?

c. Why did the client leave school (graduate, other)?

d. If the client did not complete high school, has he/she passed a high school equivalency exam?

e. Has the client received vocational training which prepared him/her to enter a particular occupation?

2. Work History

a. What were the last 3 jobs held by the client?

b. For each of those jobs, determine:

i. Weekly earnings.

ii. Length of employment (Was it long enough to acquire specific skills?).

iii. Time since job held (Has sufficient time passed for significant skill loss to take place?).

iv. Aspects of the job performed well and poorly by the client.

v. Aspects of the job liked most and least. Why?

vi. Reasons for termination of employment.

c. Prior to onset of disability, were there any significant interruptions in work history? Why?

d. Is the client presently unemployed? If yes, how long?

e. Has the client been employed since he/she was disabled?

IV. Economic Factors

1. What is the client's primary source of support?
2. Does the client have other sources of support?
3. Does the client have any unpaid debts of significant size?
4. What fixed living expenses such as medication costs cannot be reduced?
5. Does the client have a workmen's compensation case pending?
6. Is the client receiving or has the client applied for Welfare or SSI benefits?
7. Does the client have any medical insurance?
8. Is the client concerned about his/her economic situation?
9. What minimal level of earnings from work must the client receive?

3. It is unnecessary to collect every conceivable piece of information about the client either directly from him or via the efforts of other more specialized evaluators in order to get a full understanding of him/her.

4. A piece of information is important to collect if it will help you understand the client.

Example

John Smith tells the VR counselor that he would like to enter a one year training program to become a draftsman. All evaluation data suggest that such an occupational choice would be appropriate from both a client interest and aptitude standpoint. However, the counselor does not inquire about the client's wife's attitude toward the rehabilitation plan. The client drops out of the training program two months later. The counselor wonders why. The counselor checks with the client and finds out:

1. That the client's wife resented the poverty lifestyle for a year. She threatened to leave him if he remained in the program.

In retrospect, the counselor realized that he missed a significant piece of information during the evaluation phase.

2. Had he known he could have arranged for family counseling or switched the client to an OJT objective.

The counselor resolves to obtain that information from future clients who are married.

5. Review any available pre-intake interview (referral) information on a client prior to the intake interview. That review of already available information along with a review of the intake interview questions found on Table 2 in your workbook (pp. 65-66) should provide a basis for developing an intake interview plan for a particular client.

6. Avoid a "Facts With Minimum Meaning" information Collection approach.

Example

"Facts With Minimum Meaning"

An example of "Facts with Minimum Meaning" interviewing style used with a 26 year old divorced woman with an alcoholism-psychoneurotic disorder disability that yielded information for agency forms but provided little information for purposes of rehabilitation plan development follows:

Co: What was the last job you had?
Cl: I worked as a waitress at Joe's Diner.

Co: How long did you work there?
Cl: About a year.

Co: How much did you earn?
Cl: $100 a week.

Co: Have you had any other jobs?
Cl: I worked as an order-filler in a shoe factory for nine months.

Co: How much did you earn?
Cl: About $90.00 a week.

Co: Have you had any other jobs?
Cl: No.

Co: Who is your family doctor?

The work history information yielded by the above example has little meaning because the following questions cannot be answered:

1. What the client liked and did not like about the two jobs.
2. The reason for the termination of each employment situation.
3. The client's personal adjustment in the two work situations (i.e., how does she respond to authority?).
4. How well the client could meet the skill demands of the jobs.

7. Facts often gain in significance through additional exploration of related client feelings, actions, and thinking.

8. Systematic exploration of relevant topic areas during the initial interview increases the likelihood that you will obtain "factual information with maximum meaning" from the client.

Example

"Shotgun Approach"

An example of "Shotgun Approach" interviewing style is observable in part of the intake interview with a 27 year-old woman that follows:

1. Co: You're how old now?
   Cl: 27.
2. Co: Have you been trained for any jobs?
   Cl: Yeah, I had secretarial training through the WIN program.
3. Co: I see. Have you had contact with vocational rehabilitation before, uh?
   Cl: Yes, in Springfield.
4. Co: Oh, and how long ago was that?
   Cl: Oh, boy, '62, '63?
5. Co: What type of medical problem do you have?
   Cl: Diabetes. I have to take insulin.
6. Co: Okay, how many units, uh, do you take?
   Cl: 50, once a day.
7. Co: Do you have any restrictions of any kind?
   Cl: No, no.
8. Co: Above the normal ones?
   Cl: Well, I'm on a diet.

9. Co: Uh-huh.
Cl: An 1800 calorie diet.

10. Co: Okay. Are you able to carry on your daily routine around the home?
Cl: Uh, yeah, most of the time. Sometimes I get reactions depending on how much I do.

11. Co: Uh-huh. Is your husband from this area?
Cl: He was born here.

12. Co: I see.
Cl: He hasn't lived here in years though.

13. Co: Are you renting now?
Cl: Uh-huh.

14. Co: Okay. Have you worked since you moved here?
Cl: Yeah, I worked for **Kelly Girls** for about a month.

15. Co: Uh-huh. Did you work for anybody before that?
Cl: Not since we moved here.

16. Co: I see. And before you moved here?
Cl: Sales-clerked for the Goodwill.

17. Co: Uh-huh.
Cl: I imagine that was around '65.

18. Co: Did you do this for a long period of time?
Cl: No, just a short time.

19. Co: Alright. Are you receiving any welfare aid now?
Cl: Just, uh, stepfather aid for my daughter.

20. Co: How much is that a month?
Cl: $83 a month.

21. Co: This is through welfare?
Cl: Yeah, it's through welfare.

22. Co: Did you complete high school?
Cl: I took the GED test in '69.

23. Co: How far did you go in formal education?
Cl: I quit school in the 9th grade.

24. Co: Alright, did you work at that point?
Cl: No, just dropped out of school.

25. Co: You were living with your parents?
Cl: Uh-huh.

26. Co: Both parents?
Cl: Right.

27. Co: Did you have a large family?
Cl: Seven of us, not counting Mom and Dad.

28. Co: What were your reasons for quitting school?
Cl: I just didn't like it. I couldn't get anywhere. I was real slow at learning, nothing would stick with me.

29. Co: Who is your family doctor?

9. You will more likely learn more relevant information about the client if, while interviewing, you often covertly ask yourself questions about the client which tend to guide your focus.

For example:

a. "What do I know about the client?"

b. "What do I need to know about the client?"

Examples of Covert Questions that Guide Further Exploration

1. Knowing that a client has recently been fitted for a functional hand prosthesis to replace his nonfunctional cosmetic hand is an important fact that gains in significance through additional relevant exploration.
   For example:

   How does the client feel about wearing the functional prosthesis in public, e.g., does the client feel too self-conscious to wear it in many social situations?

2. Knowing that a client has been receiving psychotherapy for adjustment problems for the last year is another important fact that gains in significance through additional relevant exploration.
   For example:

   Does the client think that he has been helped by the psychotherapist? In what ways?

10. Use questions with moderation during the intake interview.

11. When you already have information about the client, pretending to not possess such can be counterproductive.

For example:

1. Co: Come in, Joe. How are you doing?
   Cl: Ah, I'm okay.
2. Co: Glad you came in today. I see that you were attending Allstar High School until recently.
   Cl: Yes, sir.
3. Co: That right?
   Cl: Yes, sir.
4. Co: How old are you?
   Cl: Eighteen.
5. Co: Ahh, what's the highest grade you've completed?
   Cl: Uh, well the highest grade that I have completed is the tenth.
6. Co: You were in the tenth at Allstar, uh, when you dropped out?
   Cl: Yes, sir.

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7. Co: So you actually completed the ninth grade then?
Cl: Yes, sir.

8. Co: Completed?
Cl: Yes, sir.

9. Co: You're. . you were taking all tenth grade subjects?
Cl: Yes, sir.

10. Co: At Alistar?
Cl: Yes, sir.

11. Co: What subjects were you making your lowest grades in?
Cl: To tell you the truth, I was making my lowest grades in all four of my subjects except P.E.

12. Co: Uh-huh. According to the, uh, school records, I have here, uh, you were actually failing English and History and Math, and uh, Science. Is that right?
Cl: Yes, sir.

13. Co: How many people are there in your family?
Cl: Ah, it's four.

14. Co: Okay. And, uh, is your father, uh, in the home?
Cl: Uh, no, sir. My real father's not in the home, but my stepfather lives there.

15. Co: Okay. What kind of work does he do?
Cl: Uhh, I really don't know.

16. Co: Your stepfather?
Cl: Yes, sir?

17. Co: Uh, does your mother work?
Cl: Yes. Uh, no, sir. She isn't working right now, but she will be going back–pretty soon.

18. Co: Uh, was it your mother that said that your stepfather works at a, uh, as a construction worker at Perfect Construction Company? Is that right?
Cl: Yes, sir, that's right.

12.

13.

14.

Information Collection Assessment Form

Directions: The Information Collection Assessment Form includes topics which may be discussed during the initial rehabilitation counseling interview. Use the form to check the topics you hear discussed with the client during the interview.

I. Referral

_____ 1. Referral source
_____ 2. Client expectations
_____ 3. Client feelings
_____ 4. Previous contact
_____ 5. Previous services
_____ 6. Current contact with other agencies
_____ 7. Services from other agencies

II. Disability/Medical

_____ 1. Disability
_____ 2. Multiple disability?
_____ 3. Duration
_____ 4. Stability
_____ 5. Previous or current treatment
_____ 6. Employment limitations
_____ 7. Daily functioning
_____ 8. Client feelings

III. Social

_____ 1. Marital status
_____ 2. Living arrangement
_____ 3. Dependents
_____ 4. Family members' attitude
_____ 5. Support from non-family
_____ 6. Satisfaction with living arrangements
_____ 7. Satisfaction with social life
_____ 8. Leisure activities

IV. Economic

_____ 1. Primary source of support
_____ 2. Other sources of support
_____ 3. Unpaid debts
_____ 4. Additional sources of support in the future
_____ 5. Medical insurance
_____ 6. Client feelings

V. Work History

_____ 1. Most recent work
_____ 2. Weekly earnings from above
_____ 3. Length of employment from above
_____ 4. Satisfaction with work
_____ 5. Performance on job
_____ 6. Feelings associated with above
_____ 7. Reason for termination
_____ 8. 2-7 for previous employment
_____ 9. Ability to get along with supervisor(s)
_____ 10. Ability to get along with co-workers
_____ 11. Present employment status
_____ 12. Length of present status
_____ 13. Job seeking behavior

VI. Vocational Goals

_____ 1. Vocational motivation
_____ 2. Vocational objective
_____ 3. Reason for vocational objective
_____ 4. Client's perception of ability to achieve vocational objective
_____ 5. Other vocational goals
_____ 6. Long range vocational planning

VII. Education

_____ 1. Highest grade completed
_____ 2. If not high school graduate, why?
_____ 3. If not high school graduate, has client passed high school equivalency exam?
_____ 4. Dislikes about school
_____ 5. Favorite subjects
_____ 6. Non-favorite subjects
_____ 7. Grades
_____ 8. Previous vocational training
_____ 9. Reaction to vocational training
_____ 10. Client feelings

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Information Collection Effectiveness

Exercise 1

1. Did the counselor appear to have a systematic plan?

2. What major topics did the counselor and client discuss?

3. What major topics did the counselor ignore that you would have covered?

4. To what degree do you think the counselor "knows" his client based on his information collection effectiveness?

5. List the strong and weak points in regard to how the counselor handled this intake interview.

Strong Points	Weak Points

6. What might be the consequences of this type of information collection?

7. In what ways might you have handled this interview differently?

Information Collection Assessment Form

Directions: The Information Collection Assessment Form includes topics which may be discussed during the initial rehabilitation counseling interview. Use the form to check the topics you hear discussed with the client during the interview.

I. Referral

_____ 1. Referral source
_____ 2. Client expectations
_____ 3. Client feelings
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_____ 5. Previous services
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_____ 7. Services from other agencies

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_____ 2. Multiple disability?
_____ 3. Duration
_____ 4. Stability
_____ 5. Previous or current treatment
_____ 6. Employment limitations
_____ 7. Daily functioning
_____ 8. Client feelings

III. Social

_____ 1. Marital status
_____ 2. Living arrangement
_____ 3. Dependents
_____ 4. Family members' attitude
_____ 5. Support from non-family
_____ 6. Satisfaction with living arrangements
_____ 7. Satisfaction with social life
_____ 8. Leisure activities

IV. Economic

_____ 1. Primary source of support
_____ 2. Other sources of support
_____ 3. Unpaid debts
_____ 4. Additional sources of support in the future
_____ 5. Medical insurance
_____ 6. Client feelings

V. Work History

_____ 1. Most recent work
_____ 2. Weekly earnings from above
_____ 3. Length of employment from above
_____ 4. Satisfaction with work
_____ 5. Performance on job
_____ 6. Feelings associated with above
_____ 7. Reason for termination
_____ 8. 2-7 for previous employment
_____ 9. Ability to get along with supervisor(s)
_____ 10. Ability to get along with co-workers
_____ 11. Present employment status
_____ 12. Length of present status
_____ 13. Job seeking behavior

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_____ 1. Vocational motivation
_____ 2. Vocational objective
_____ 3. Reason for vocational objective
_____ 4. Client's perception of ability to achieve vocational objective
_____ 5. Other vocational goals
_____ 6. Long range vocational planning

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_____ 1. Highest grade completed
_____ 2. If not high school graduate, why?
_____ 3. If not high school graduate, has client passed high school equivalency exam?
_____ 4. Dislikes about school
_____ 5. Favorite subjects
_____ 6. Non-favorite subjects
_____ 7. Grades
_____ 8. Previous vocational training
_____ 9. Reaction to vocational training
_____ 10. Client feelings

Information Collection Effectiveness

Exercise 2

1. Did the counselor appear to have a systematic plan?

2. What major topics did the counselor and client discuss?

3. What major topics did the counselor ignore that you would have covered?

4. To what degree do you think the counselor "knows" his client based on his information collection effectiveness?

5. List the strong and weak points in regard to how the counselor handled this intake interview.

Strong Points	Weak Points

6. What might be the consequences of this type of information collection?

7. In what ways might you have handled this interview differently?

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Review of Guidelines for Information Collection

Often it is helpful to obtain a comprehensive understanding of the client during the initial interview. That understanding is greatly a function of your ability to achieve the objectives found in your interview plan. Although, you do not have to collect every conceivable piece of information about a client, you must obtain as much information as possible relevant to the achievement of your objectives.

More relevant information will be yielded through your interviews if you:

1. Can discriminate between relevant and irrelevant information to collect,
2. Have a pre-intake interview plan,
3. Systematically explore relevant topic areas,
4. Ask relevant questions at appropriate times but do not act like a "grand inquisitor,"
5. Avoid a "facts with minimum meaning" information collection approach.
6. Facilitate the development of rapport by allowing the client sufficient freedom of expression within a logically structured interview. How to do that will be the focus of our next two sections–Non-Verbal and Verbal Interaction Techniques.

Information Collection Topics

Check the topics that you usually discuss with each client during an intake interview

I. Referral

_____ 1. Referral source
_____ 2. Client expectations
_____ 3. Client feelings
_____ 4. Previous contact
_____ 5. Previous services
_____ 6. Current contact with other agencies
_____ 7. Services from other agencies

II. Disability/Medical

_____ 1. Disability
_____ 2. Multiple disability?
_____ 3. Duration
_____ 4. Stability
_____ 5. Previous or current treatment
_____ 6. Employment limitations
_____ 7. Daily functioning
_____ 8. Client feelings

III. Social

_____ 1. Marital status
_____ 2. Living arrangement
_____ 3. Dependents
_____ 4. Family members' attitude
_____ 5. Support from non-family
_____ 6. Satisfaction with living arrangements
_____ 7. Satisfaction with social life
_____ 8. Leisure activities

IV. Economic

_____ 1. Primary source of support
_____ 2. Other sources of support
_____ 3. Unpaid debts
_____ 4. Additional sources of support in the future
_____ 5. Medical insurance
_____ 6. Client feelings

V. Work History

_____ 1. Most recent work
_____ 2. Weekly earnings from above
_____ 3. Length of employment from above
_____ 4. Satisfaction with work
_____ 5. Performance on job
_____ 6. Feelings associated with above
_____ 7. Reason for termination
_____ 8. 2-7 for previous employment
_____ 9. Ability to get along with supervisor(s)
_____ 10. Ability to get along with co-workers
_____ 11. Present employment status
_____ 12. Length of present status
_____ 13. Job seeking behavior

VI. Vocational Goals

_____ 1. Vocational motivation
_____ 2. Vocational objective
_____ 3. Reason for vocational objective
_____ 4. Client's perception of ability to achieve vocational objective
_____ 5. Other vocational goals
_____ 6. Long range vocational planning

VII. Education

_____ 1. Highest grade completed
_____ 2. If not high school graduate, why?
_____ 3. If not high school graduate, has client passed high school equivalency exam?
_____ 4. Dislikes about school
_____ 5. Favorite subjects
_____ 6. Non-favorite subjects
_____ 7. Grades
_____ 8. Previous vocational training
_____ 9. Reaction to vocational training
_____ 10. Client feelings

A Decade of Rehabilitation Counselor Information Collection Behavior (N=114)

I. Referral Information

Percent		
50.88	1.	Referral source.
41.23	2.	Client expectations from Vocational Rehabilitation Agency.
11.41	3.	Client's feelings associated with being referred or seeking vocational rehabilitation services.
44.74	4.	Amount of previous contact with a state vocational rehabilitation agency.
12.28	5.	Previous services received by client from a state vocational rehabilitation agency.
37.72	6.	Amount of current contact with other agencies or professionals.
25.44	7.	Services being received by client from other agencies and professionals.

II. Disability/Medical Information

Percent		
35.09	1.	Disability reported by client.
56.14	2.	Are there multiple disabilities?
61.41	3.	Duration of disability(ies).
43.86	4.	Stability of disability(ies).
75.44	5.	Previous or current treatment of disability(ies).
43.86	6.	Disability-caused limitations to employment.
35.97	7.	In what manner and to what extent has the client's disability affected him/her in regard to non-employment related daily functioning?
34.21	8.	Client's feelings associated with his/her disability.

III. Social Information

Percent		
65.79	1.	Client's marital status.
75.44	2.	Client's current living arrangements.
50.88	3.	Number of dependents.
9.65	4.	Attitude of family members toward client's seeking of vocational rehabilitation services.
4.39	5.	Support from non-family associates.
20.18	6.	Client's satisfaction with current living arrangements.
11.41	7.	Client's satisfaction with social life.
15.79	8.	Client's leisure time activities.

IV. Economic Information

Percent		
65.79	1.	Client's primary source of support.
45.62	2.	In addition to client's primary source of support, does he/she have other sources of support?
19.30	3.	Does the client have any unpaid debts of significant size?
13.16	4.	Will the client have any additional sources of income in the future?
37.72	5.	Does the client have medical insurance?
22.81	6.	Client's feelings associated with his/her economic situation.

V. Work History

Percent		
74.57	1.	The client's most recent work experience.
34.21	2.	How much was client's weekly earnings on that job?
53.51	3.	Length of employment for the job.
18.43	4.	How did the client like the job?
9.65	5.	How well did the client perform the job?
17.55	6.	What are the client's feelings about his/her most recent employment situation?
42.11	7.	Reason for termination of that job.
43.86	8.	Information on the majority of above pertaining to earlier jobs, or determination of no earlier jobs.
5.27	9.	How well did client get along with previous work supervisor(s)?
3.51	10.	How well did client get along with previous workers?
51.76	11.	Is the client presently unemployed?
13.16	12.	How long has the client been unemployed?
10.53	13.	Has the client sought work recently?

VI. Vocational Goals

Percent		
74.57	1.	Does the client want either a job or training?
67.55	2.	Does the client have a specific vocational goal?
47.37	3.	If yes, why is the client interested in that vocational goal?
27.20	4.	How optimistic or pessimistic is the client about his/her ability to achieve a vocational goal?
25.44	5.	Does the client have more than one potential vocational goal?
6.14	6.	What does the client see him/herself doing, vocationally, five years from now?

VII. Educational Information

Percent		
70.18	1.	How far did the client go in school?
16.67	2.	If client did not complete his/her last school experience, why?
13.16	3.	If client did not complete high school, has he/she passed a high school equivalency exam?
14.92	4.	What did (does) the client like or dislike about school?
16.67	5.	What were (are) the client's favorite subjects in school?
7.02	6.	What subjects did (does) the client dislike most?
23.69	7.	What kind of grades did (does) the client make?
28.95	8.	Amount of previous vocational training?
8.78	9.	Client's reaction to previous vocational training.
17.55	10.	Client's feelings associated with his/her educational experience and educational status.

VIII. Miscellaneous

Percent		
9.65	1.	Client's perception or understanding of what has transpired during interview.
8.78	2.	Client's plans between now and next interview.

Information Collection Topics

Topics usually discussed by the Majority of Rehabilitation Counselors during the Intake Interview

I. Referral

- ● 1. Referral source
- 2. Client expectations
- 3. Client feelings
- 4. Previous contact
- 5. Previous services
- 6. Current contact with other agencies
- 7. Services from other agencies

II. Disability/Medical

- ● 1. Disability
- ● 2. Multiple disability?
- ● 3. Duration
- 4. Stability
- ● 5. Previous or current treatment
- 6. Employment limitations
- 7. Daily functioning
- 8. Client feelings

III. Social

- ● 1. Marital status
- ● 2. Living arrangement
- ● 3. Dependents
- 4. Family members' attitude
- 5. Support from non-family
- 6. Satisfaction with living arrangements
- 7. Satisfaction with social life
- 8. Leisure activities

IV. Economic

- ● 1. Primary source of support
- 2. Other sources of support
- 3. Unpaid debts
- 4. Additional sources of support in the future
- 5. Medical insurance
- 6. Client feelings

V. Work History

- ● 1. Most recent work
- 2. Weekly earnings from above
- ● 3. Length of employment from above
- 4. Satisfaction with work
- 5. Performance on job
- 6. Feelings associated with above
- 7. Reason for termination
- 8. 2-7 for previous employment
- 9. Ability to get along with supervisor(s)
- 10. Ability to get along with co-workers
- ● 11. Present employment status
- 12. Length of present status
- 13. Job seeking behavior

VI. Vocational Goals

- ● 1. Vocational motivation
- ● 2. Vocational objective
- 3. Reason for vocational objective
- 4. Client's perception of ability to achieve vocational objective
- 5. Other vocational goals
- 6. Long range vocational planning

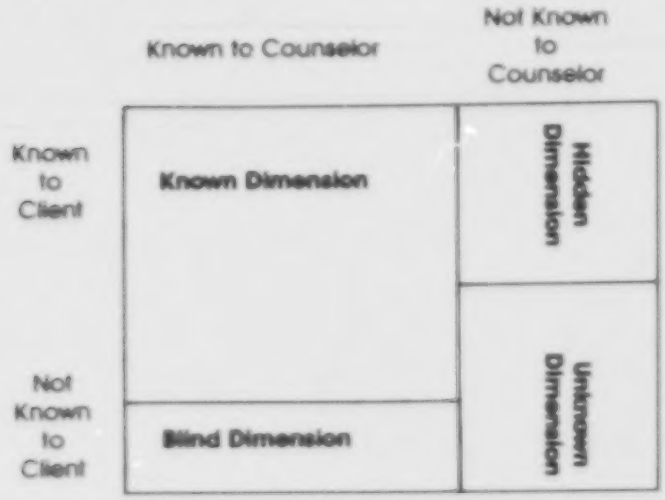
VII. Education

- ● 1. Highest grade completed
- 2. If not high school graduate, why?
- 3. If not high school graduate, has client passed high school equivalency exam?
- 4. Dislikes about school
- 5. Favorite subjects
- 6. Non-favorite subjects
- 7. Grades
- 8. Previous vocational training
- 9. Reaction to vocational training
- 10. Client feelings

Systematic Interview Programming Format

1. What are my objectives for this interview?
2. What information does the client need from me to achieve those objectives? Specific topics developed in Section III, such as role & function of agency, my role & function, client rights, & responsibilities.
3. What information do I need from the client to achieve those objectives? Specific topics developed in Section IV under the categories: physical factors, education-voc. skill & interest factors, psychosocial factors, economic factors, & voc. choice & job accessibility factors.
4. What is the most effective and efficient way to exchange that information?
   A. Attract the client in a facilitative manner so that he/she comes to the interview with a positive attitude.
   B. Carry out all the guidelines for effective planning.
   C. Structure the interview setting making it conducive to the exchange of information.
   D. When disseminating information attend to language level used, amount of information in one shot, timing, and client's comprehension of the information.
   E. When collecting information, be selective, avoid a facts with minimum meaning approach, be systematic, and use questions in moderation.

Relevant Information Awareness



Section V

Exchanging Information via Non-Verbal Interaction Techniques

Non-Verbal Interaction Techniques

Purpose of Section V

1. To learn about a set of Non-Verbal Interaction Techniques that serve to initiate the helping process and facilitate the exchange of information.
2. To learn the skills of exchanging information in a non-verbal fashion.
3. To learn the skills of facilitating the information exchange process.
4. To contrast the impact of effective and non-effective use of Non-Verbal Interaction Techniques.
5. To practice Non-Verbal Interaction Techniques.

Definition of Non-Verbal Interaction Techniques

Steps

1. Positioning - posturing the body
2. Observing - seeing the client's non-verbal communication
3. Listening - hearing the client's verbal responses

Importance of Non-Verbal Interaction Techniques

Objectives of Non-Verbal Interaction Techniques Training

Step I - Positioning Techniques

Definition of Positioning

Importance of Facilitative Positioning

Objectives of Positioning Training

Guidelines for Facilitative Positioning

1. Put aside what you are doing and give the client your full attention.
2. Establish a proper distance between you and the client.
3. Face the client squarely.
4. Lean or rotate your body toward the client.
5. Develop eye-contact.
6. Assume and maintain an "open" posture.
7. Maintain a relaxed manner.
8. Refrain from distracting movements.
9. Be aware of special positioning considerations for certain types of clients.

Other Guidelines

10.
11.
12.
13.

Possible Results of Non-Facilitative Positioning

1.
2.
3.
4.
5.
6.
7.
8.

Possible Results of Facilitative Positioning

1.
2.
3.
4.
5.
6.
7.
8.

Discriminating Between Effective & Non-Effective Positioning

1. Is the above position helpful or non-helpful?
2. Why?

1. Is the above position helpful or non-helpful?
2. Why?

Discriminating Between Effective & Non-Effective Positioning continued

1. Is the above position helpful or non-helpful?
2. Why?

Step II - Observing the Client

Definition of Observing

Importance of Observing

Objectives of Observing Training

Guidelines for Facilitative Observing

1. Look at the client's Positioning.
2. Look at the client's grooming.
3. Look at the client's level of activity.
4. Look at the client's gestures.
5. Look at facial expressions.
6. Look for feelings.
7. Look for patterns in the client's non-verbal behavior.
8. Non-Verbal cues should present you with hypotheses to be checked out with client.

Other Guidelines

9.
10.
11.
12.

Step III - Listening Techniques

Definition of Listening

Importance of Listening

Objectives of Listening Training

Guidelines for Effective Listening

1. Resist internal distractions.
2. Initially suspend judgement.
3. Have goals for Lisiening.
4. Listen for the client's description of his/her situation.
5. Listen for the client's feeling.
6. Listen for client's description of his/her behavioral response to a situation.
7. Listen for the client's major area of concern.
8. Listen for common themes.
9. Listen to the client's tone of voice.
10. Be aware of any inconsistencies in the client's communication.
11. Communicate your attentiveness.

Other Guidelines

12.
13.
14.
15.

Observing-Listening

Exercise 1

1. Did the interviewer practice facilitative observing?

2. Did the counselor practice effective listening?

3. What major mistakes did he make?

4. Which of the guidelines for effective observing and listening can you be sure he performed?

5. What are some things you learned about the client just by observing and listening to him?

Possible Results of Ineffective Observing and Listening

Observing-Listening

Exercise 2

1. Did the interviewer practice facilitative observing?

2. Did the counselor practice effective listening?

3. What were his strong points?

4. Which of the guidelines for effective observing-listening can you be sure he performed?

5. What are some things you learned about the client just by observing and listening to him?

Possible Results of Effective Observing and Listening

Observing and Listening Practice Exercise

Discussion Topics:

A. Interracial marriages–good or bad? Why?

B. Premarital and extramarital sex. Acceptable or not? Why?

C. Require certification and/or licensure for rehabilitation counselors.

D. Merge Rehabilitation and Welfare and do away with eligibility requirements.

E. Double sex standards for men and women. For or against? Why?

F. Equal employment opportunities for men and women.

Discussion Questions:

1. Was it difficult to listen to the other person? If so, why?
2. Did you have difficulty formulating your thoughts and listening at the same time?
3. Did you experience any of the signs of making judgements?
4. Were you able to feed back to the Speaker what you heard without any inconsistencies?

Non-Verbal Interaction Techniques

Positioning

attention
distance
face squarely
incline body toward
eye-contact
open-posture
relaxed
no distracting movements

Listening

no internal distractions
suspend judgement
goals
actual words
self-talk
feelings
actions
area of concern
themes
tone of voice
inconsistencies
attentiveness
wait

Observing

client's positioning
grooming
level of activity
gestures
facial expressions
feelings
patterns

Interaction Techniques Self-Assessment Guide

Part I - Non-Verbal Behavior Check List

During an interview I perform the following behaviors. . .

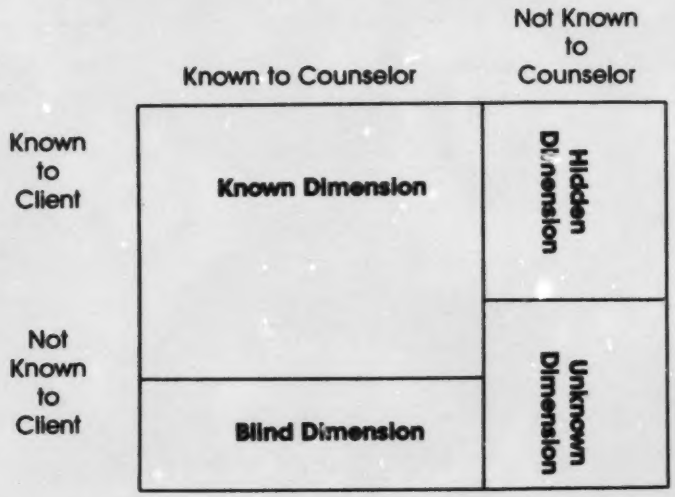
Yes	No	N/A	
____	____	____	1. Put aside what I am doing and give the client my total attention.
____	____	____	2. Establish a proper distance between me and the client.
____	____	____	3. Face the client squarely.
____	____	____	4. Lean or rotate my body toward the client.
____	____	____	5. Develop and maintain eye-contact.
____	____	____	6. Assume and maintain an "open" posture. Do not cross arms and legs.
____	____	____	7. Maintain a relaxed position.
____	____	____	8. Refrain from distracting movements (fidgeting, etc.).
____	____	____	9. Observe the client's posturing.
____	____	____	10. Observe the client's personal appearance.
____	____	____	11. Observe and determine the client's level of activity.
____	____	____	12. Observe the client's gestures.
____	____	____	13. Observe the client's facial expressions.
____	____	____	14. Look for and determine the client's feelings from the client's non-verbal communication.
____	____	____	15. Look for patterns in the client's non-verbal communication.
____	____	____	16. Develop hypotheses based on the client's non-verbal cues.
____	____	____	17. Resist internal distractions. Focus my total attention on the client and not think about extraneous things.
____	____	____	18. Initially suspend judgement. I show none of the evidence of judgemental thinking such as interrupting the client, obvious affective reactions, etc.
____	____	____	19. Have goals for listening. I know exactly what I am listening for and listen systematically.
____	____	____	20. Listen to the actual words of the client that describe the situation he/she is talking about. I hear exactly what the client says he/she sees, hears, senses, etc.
____	____	____	21. Listen for a description of what the client says to self about the situation being discussed.
____	____	____	22. Listen for and determine the client's feelings from his/her verbal expressions.
____	____	____	23. Listen for the client's description of his/her behavioral actions in the situation.

Yes	No	N/A	
_____	_____	_____	24. Listen for and focus on the client's major area of concern.
_____	_____	_____	25. Listen for common themes in the client's verbal expressions.
_____	_____	_____	26. Listen to client's tone of voice; volume, intensity, rapidity, etc.
_____	_____	_____	27. Am aware of any inconsistencies in the client's communication especially between verbal and non-verbal communication.
_____	_____	_____	28. Communicate my attentiveness by varied facial expressions, smiling, head nods, hand gestures, etc.

Systematic Interview Programming Format

1. What are my objectives for this interview?
2. What information does the client need from me to achieve those objectives?
   A. Specific topics developed in Section III.
   B. Knowledge of my attitude that demonstrates respect, positive regard, concern, attentiveness, involvement, etc.
3. What information do I need from the client to achieve those objectives?
   A. Specific topics developed in Section IV.
   B. Knowledge of client's attitude and involvement.
4. What is the most effective and efficient way to exchange that information?
   A. Attract the client in a facilitative manner so that he/she comes to the interview with a positive attitude.
   B. Carry out all the guidelines for effective planning.
   C. Structure the interview setting making it conducive to the exchange of information.
   D. When disseminating information attend to the language level used, amount of information in one shot, timing, and interviewee's comprehension of the information.
   E. When collecting information, be selective, avoid a facts with minimum meaning approach.
   F. Practice effective positioning, observing, and listening.

Relevant Information Awareness Matrix



Section VI

Exchanging Information via Verbal Responding

Exchanging Information via Verbal Responding

Purposes of Section VI

1. To learn about Moment-to-Moment Verbal Interaction Techniques that are used most frequently to collect and disseminate information during the intake interview.
2. To learn the different uses of Moment-to-Moment Responses.
3. To learn how to identify Moment-to-Moment Responses that are used to exchange information.
4. To learn how to identify major response modes/styles.
5. To contrast effective and non-effective response modes/styles.
6. To synthesize and integrate everything learned up to this point by examining Interaction Profiles which include total interviews instead of Moment-to-Moment Responses.
7. To practice a facilitative response style.

Definition of Verbal Interaction Techniques

Step I - Moment-to-Moment Responses During the Intake Interview

Definition of Moment-to-Moment Responses

Most common Moment-to-Moment Responses during the intake interview:

1. The Continue Response
2. The Restricted-Focus Response
3. The Exploratory-Focus Response
4. The Check Response
5. The Declarative Response
6. The Self-Expressive Response

Importance of Moment-to-Moment Responses

The Continue Response

Definition

Common examples

Verbal: "um-hum"
"yes"
"right"
"yea"

Non-Verbal: body posture
head nods
smile
hand gestures

Importance

Common uses

The Restricted-Focus Response

Definition

Common descriptors

closed-ended questions
binary-focus responses

Common examples

How old are you?
What is your name?
What is your social security number?
Have you been here before?

Importance

Common Uses

The Exploratory-Focus Response

Definition

Common examples

Tell me more about. . .
What do you think about this plan?
Describe the situation to me.
How did it happen?

Importance

Common uses

The Check Response

Definition

Common descriptors

reflections
verifications
paraphrasing
restatement

Common examples

You mean. . .
You're happy because you. . .
I understand you saying. . .
Essentially then. . .

Importance

Common uses

The Declarative Response

Definition

Common descriptors

Informing
Statement-of-fact
Instructions
Explanation

Common examples

Our Agency can do this. . .
His/her office is located. . .
You scored at the 95th percentile. . .
To be eligible you must. . .

Importance

Common uses

The Self-Expressive Response

Definition

Common descriptors

advice
support-approval-assurance
opinion
self-disclosure

Common examples

I think you should. . .
I'm really concerned about you.
Oh, I think you will be okay.
I don't like that.

Importance

Common uses

Interaction Techniques Classification Form: Worksheet

Type of Response

Continue	Restricted Focus	Exploratory Focus	Check	Declarative	Self Expressive	Total	
							total
							percent

Guidelines for the Facilitative Use of Moment-to-Moment Responses

1. Use exploratory-focus and check responses to open the intake interview.
2. Use exploratory-focus responses to gather information from the client's perspective.
3. Utilize exploratory-focus and check responses to break unproductive pauses during the interview.
4. Use exploratory-focus, check, and continue responses frequently to build, strengthen, and maintain rapport.
5. Use exploratory-focus, check, and continue responses when you want to gather additional information about a topic being discussed.
6. Use exploratory-focus, check, and continue responses to facilitate client self-exploration.
7. Use restricted-focus responses to gather specific bits of information.
8. Use restricted-focus responses to narrow the area of conversation.
9. Use continue responses freely to encourage the client to keep talking without interrupting his/her momentum.
10. Utilize check responses to communicate your understanding of what the client is saying.
11. Use declarative responses to present factual information needed by the client.
12. Make your declarative responses as descriptive in character and neutral in tone as possible.
13. Make your declarative responses in a language the client can understand.
14. When you think the client can benefit from information from your own frame of reference, use self-expressive responses.
15. Avoid self-expressive responses in the form of inappropriate advice.
16. Avoid self-expressive responses that communicate low levels of respect and negative regard.

Other Guidelines

17.
18.
19.
20.

Using Moment-to-Moment Responses

When You Want To	Utilize the Following Response	Examples of How	Why
Open an interview	Exploratory-Focus	"Let's begin by you telling me what brings you here."	Focuses interview on client concerns
	Check	"You look a little anxious today."	
Gather information from the client's perception	Exploratory-Focus	"What are you thinking right now?" "Tell me more about. . ."	Enables you to avoid imposing your own diagnostic biases into the information process and minimizes categorical and labeling biases
To break unproductive pauses– Get client to start talking again after lapse in discussion	Exploratory-Focus	"Tell me what you are thinking right now."	Encourage client to talk with many alternatives for self-expression
	Check	"You seem to have a loss for words right now."	
Build, strengthen and maintain rapport	Exploratory-Focus	"Tell me what you are experiencing right now."	Communicates attentiveness, interest, concern, involvement, and allows client free expression thus focusing interview on client concerns
	Check	"It seems that you think you are. . ."	
	Continue	"Um-hum"	
Gather additional information about a topic being discussed	Exploratory-Focus	"Tell me more about. . ."	Facilitates the client's elaboration of a point
	Check	"Essentially then you think. . ."	
	Continue	"Yea"	
Facilitate client self-exploration	Exploratory-Focus	"Tell me a little about yourself."	Communicates attentiveness, interest, concern, involvement, and allows client free expression thus focusing interview on client concerns
	Check	"You are angry because you. . ."	
	Continue	"Um-hum"	
Gather a specific bit of information	Restricted-Focus	"How old are you?"	Most direct means of gathering specific bits of information

When You Want To	Utilize the Following Response	Examples of How	Why
Narrow the area of conversation	Restricted-Focus	"How old are you?"	Focuses the client's attention on a central issue
Encourage client to keep talking without interrupting his momentum	Continue	"Um-hum"	Communicates attentiveness, interest, concern, and involvement
Communicate understanding so as to get additional information	Check	"You're really tense."	Lets client know you understand and encourages continued talking
Give client factual objective information	Declarative	"Our agency will do this. . ."	Gives client information not readily available to him
To express assurance and support	Self-Expressive	"I think you can do it."	Sometimes needed during helping interview
To disclose something about self to client	Self-Expressive	"I once had that same experience, I. . ."	Sometimes needed during helping interview
Give client information from your own frame of reference	Self-Expressive	"This is the way I see it."	Sometimes needed during helping interview

*All Verbal Interaction Techniques are used in conjunction with Facilitative Non-Verbal Interaction Techniques.

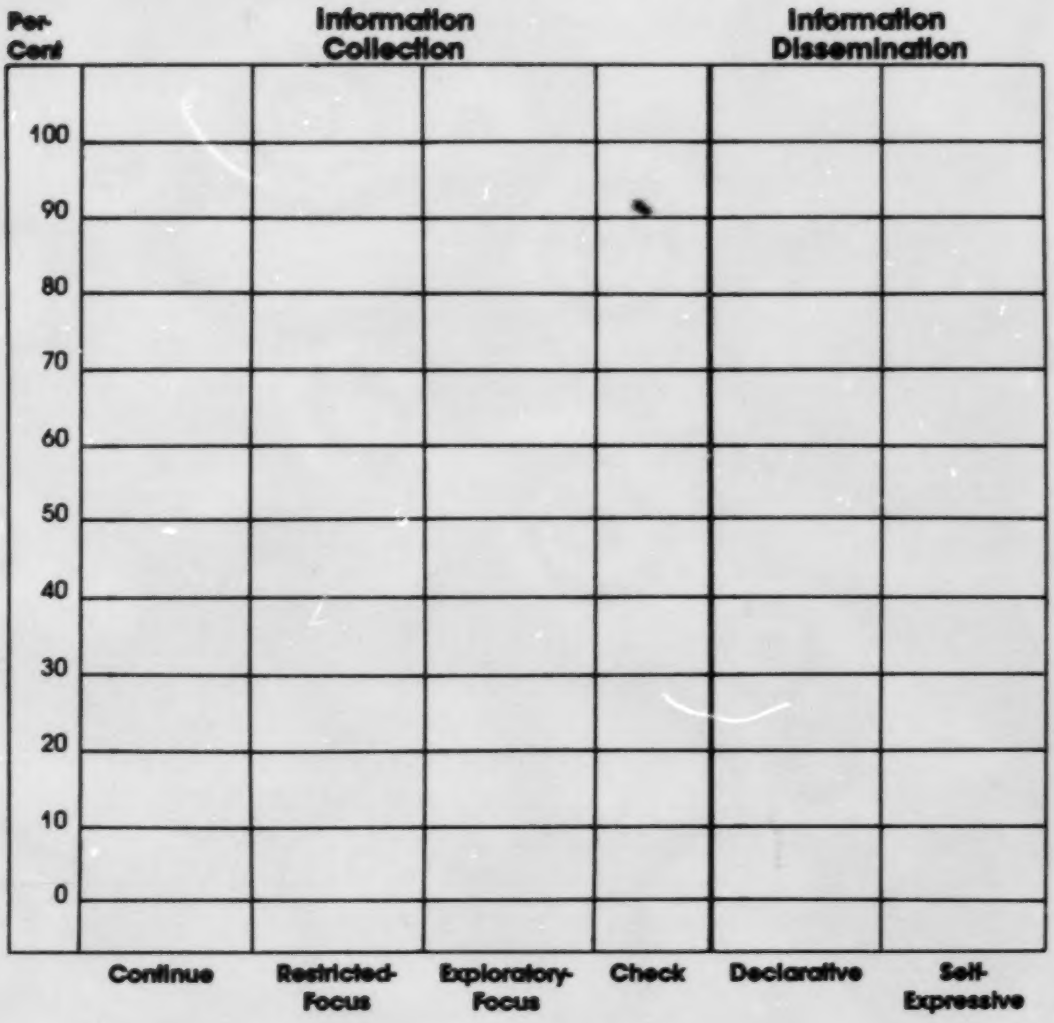
Step II - Major Response Styles during the Intake Interview

Definition of Response Styles

Importance of Response Styles

Objectives of Response Style Training

Interview Profile



The Listener

Definition

Description of Listener

Effect of Listener on Client

The Interrogator

Definition

Description of Interrogator

Effect of Interrogator on Client

11~

The Explorer

Definition

Description of Explorer

Effect of Explorer on Client

The Reflector

Definition

Description of Reflector

Effect of Reflector on Client

The Informer

Definition

Description of Informer

Effect of Informer on Client

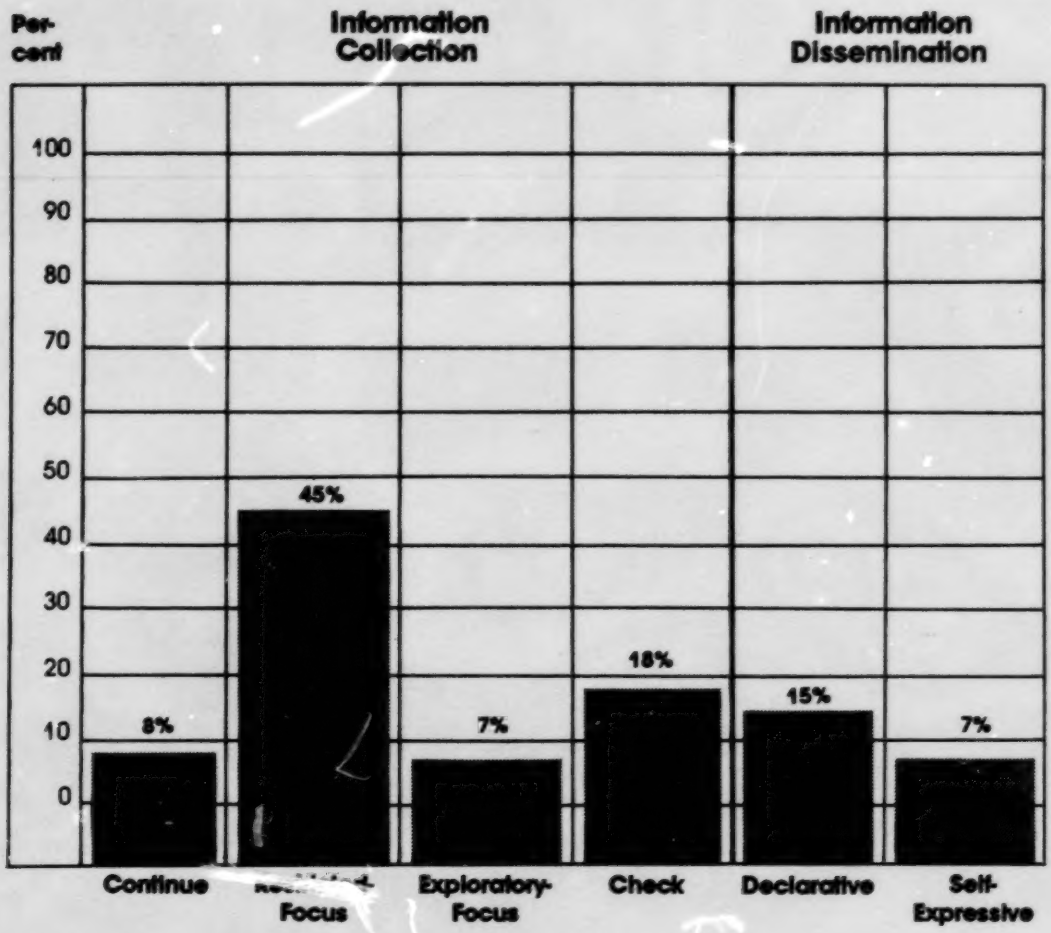
The Self-Expresser

Definition

Description of Self-Expresser

Effect of Self-Expresser on Client

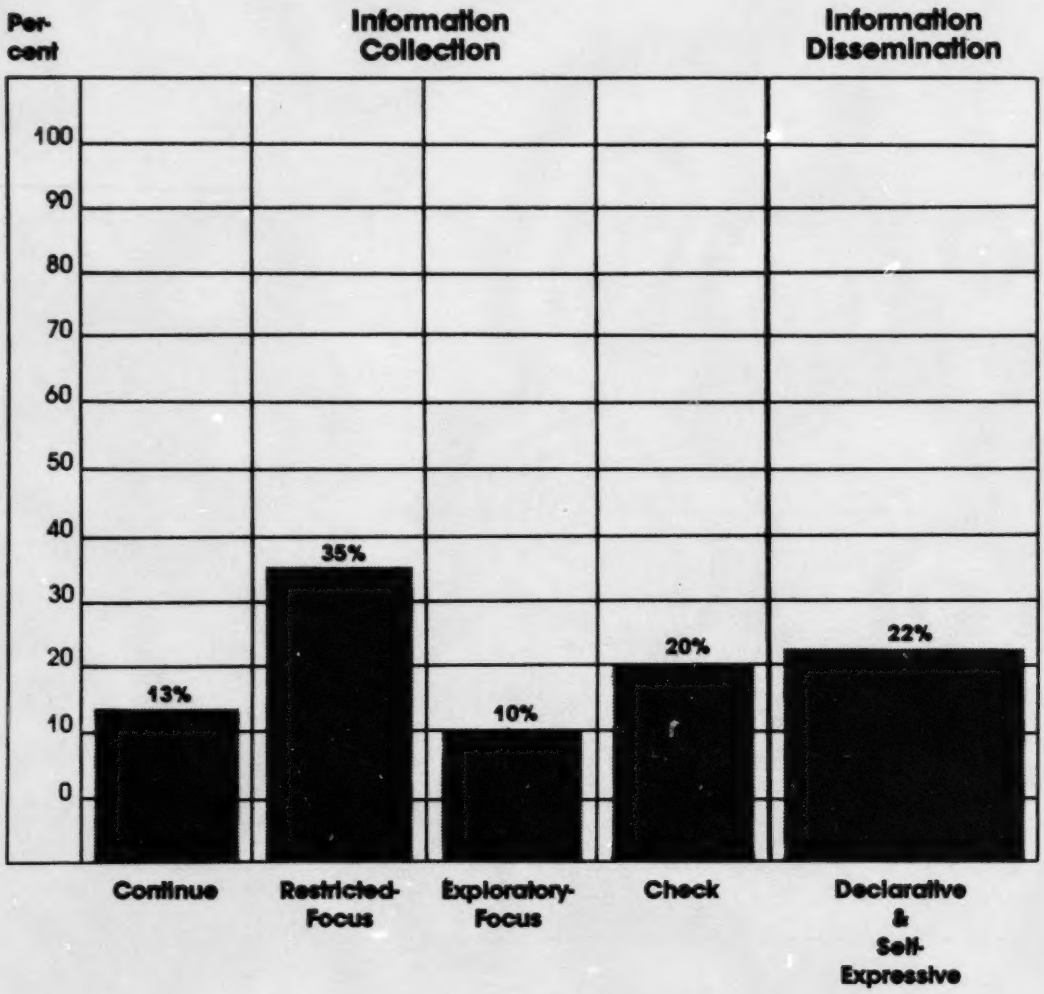
Interaction Profiles of Rehabilitation Counselors During Initial Interviews



13 State Sample - Late 60's, Early 70's
(N=32)

Notes:

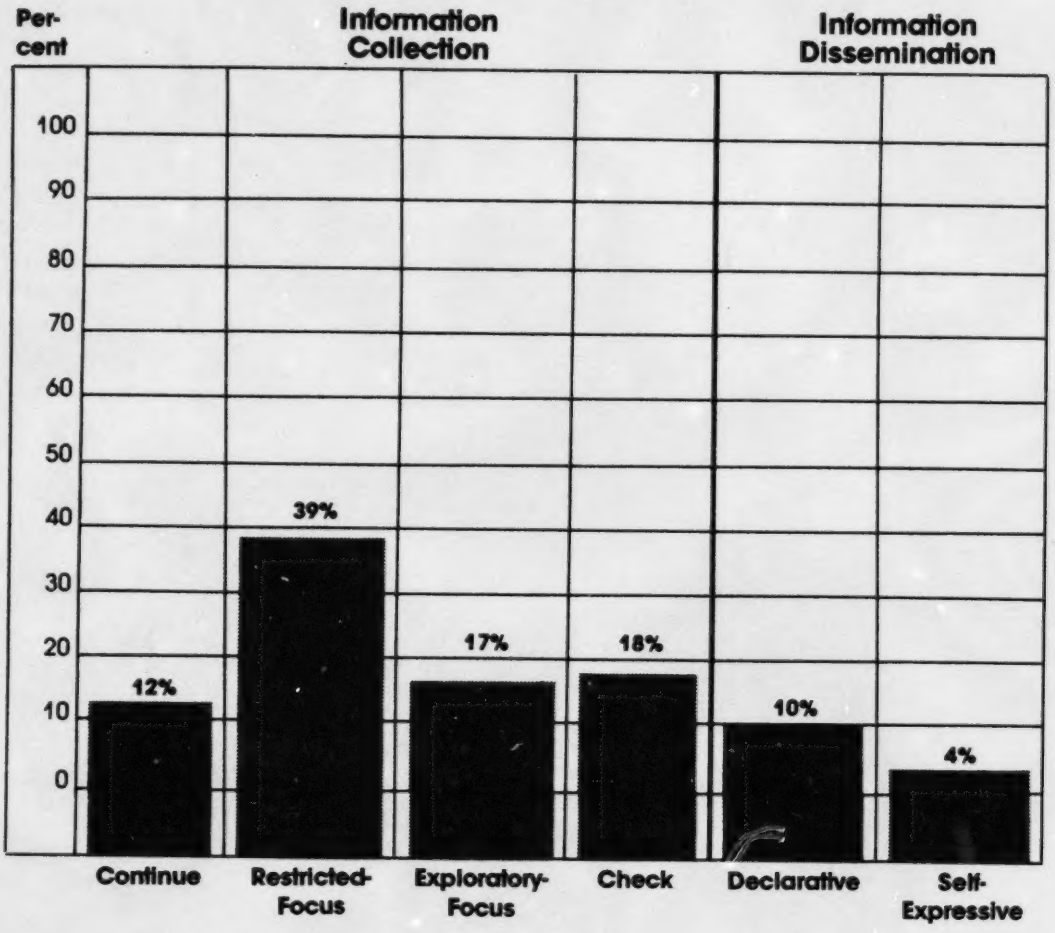
Interaction Profiles of Rehabilitation Counselors During the Initial Interview



1 State Sample - Mid 70's
(N=56)

Notes:

Interaction Profiles of Rehabilitation Counselors During the Initial Interview



1 State Sample - Late 70's
(N=30)

Notes:

Guidelines for a Facilitative Response Style

Behold the Facilitator:

1. Assume a position to exchange information in the most effective manner.
2. Observe the client.
3. Listen to your client.
4. Open the interview with responses that will focus on the concerns of the client.
5. Continue to facilitate the information exchange process by focusing on the client concerns.
6. Allow the client as many alternatives for self-expression as possible.
7. Facilitate the client's elaboration of topics.
8. Use responses that tend to widen the client's perceptual field.
9. "Train" your clients to freely express themselves.
10. Establish this "training" process early.
11. Build, strengthen, and maintain a positive relationship.
12. Communicate you attentiveness, concern, and involvement.
13. Avoid the use of questions as your **only** tool for gathering information.
14. Let the client know you are hearing him/her correctly.
15. Communicate your empathic understanding of the client frequently.
16. Do not hesitate to clear up your thinking of what the client's communication may mean.
17. Break unproductive pauses during the interview with responses that keep the focus on the client.
18. When factual information is needed by the client, utilize declarative responses appropriately.
19. When information from your frame of reference seems appropriate, use self-expressive responses wisely.

Other Guidelines

20.

21.

22.

Suggestions for a Facilitative Response Style

Use What	When You Want to	Why	How
Positioning	Engage client	Communicates attentiveness, involvement & concern	Posture
Observing	Collect non-verbal information & communicate respect	Enables you to really "see" client	Look at client
Listening	Collect verbal information & communicate respect	Enables you to really "hear" client	Active Listening Techniques
Exploratory-Focus & Check Responses	Open the interview	Focuses interview on client concerns	"What can I do for you today?" "You look quite excited about something."
Exploratory-Focus Responses	Gather information from client's frame of reference	Avoids imposing your own biases into information gathering process	"What do you think about it?"
Continue, Check, & Exploratory-Focus Responses	Build, strengthen, & maintain a positive relationship	Facilitates rapport	"Uh-hum" "You seem down today." "Describe your reaction."
Continue, Check, & Exploratory-Focus Responses	Allow client as many alternatives for self-expression as possible	Does not restrict expression. Encourages expression	"Uh-hum" "So you don't like it that way." "Describe the situation."
Exploratory-Focus Responses	Widens client's perceptual field	Solicit the client's views, opinions, thoughts, & feelings	"How do you see it?"

Use What	When You Want To	Why	How
Exploratory-Focus, Check, & Continue Responses	Focus on client's concerns	Allows client freedom of expression	"What do you think of it?" "You're really angry about that." "Uh-hum"
Exploratory-Focus, Check, & Continue Responses	Facilitate elaboration of topic	Encourages narrative type responding instead of short quick answers	"Tell me more about." "This is what I hear you saying. . ." "Uh-hum"
Exploratory-Focus Responses	Train your client to respond more openly	Encourages narrative statements instead of short quick answers	"Describe your reaction."
Exploratory-Focus, Check, &Continue Responses	Set a pattern that facilitates free expression	Avoids a pattern that discourages free expression	"How did you do/see that?" "You seem depressed today." "Uh-hum"
Exploratory-Focus & Check Responses	Avoid questioning as only tool for gathering information	Allow alternate forms of information gathering	"Tell me more about. . ." "Describe the situation." "Then you really want to. . ."
Non-Verbal Interaction Techniques & Continue Responses	Communicate your attentiveness, concern and involvement	Communicates respect	Position, Observe, Listen, Label, "Uh-hum", head nods, hand gestures
Restricted-Focus	Gather strictly factual information	Most direct means	"How old are you?"
Check Responses	Let the client know how you hear him	Communicates understanding	"What I hear you saying is. . ."

Use What	When You Want To	Why	How
Check Responses	Clear up your thinking as to what client means	Provides opportunity to clarify any mis-understanding	"Essentially then you want to. . ."
Exploratory-Focus & Check Responses	Break unproductive pauses during interview	Keeps the focus on client & encourages self-expression	"What are you thinking right now?" "You seem a little confused."
Declarative Responses	Give factual information	Provides client with needed information not readily available to him	"Our agency can do this." (Descriptive in character, neutral in tone & in a language client can understand)
Self-Expressive Responses	Give information from your frame of reference	Sometimes helpful during interview	"You can do it." (Avoid advice giving, preaching, blaming, exhorting, placating, cajoling, intellectualizing, etc.)

Information Dissemination Assessment Form

Directions: The Information Dissemination Assessment Form includes topics which may be discussed during the initial rehabilitation counseling interview in categories I-IV. Use the form to check the topics you hear discussed with the client. Category V allows you to assess the manner in which information was disseminated. Place a check by each behavior you think was performed.

I. Role & Function of the Rehabilitation Agency

_____ 1. Purpose of agency
_____ 2. What the agency is not
_____ 3. Eligibility criteria
_____ 4. Fact that an eligibility decision will be made
_____ 5. Services provided
_____ 6. Objectives of certain services
_____ 7. Why the person was referred

II. Role & Function of the Rehabilitation Counselor

_____ 1. Arranger of services
_____ 2. Provider of services
_____ 3. Client advocate
_____ 4. Team member
_____ 5. Joint approach with client
_____ 6. Actions in specific situations
_____ 7. Lack of action in specific situations
_____ 8. Interview information utilization
_____ 9. External information utilization

III. Client Rights

_____ 1. Objectives of interview
_____ 2. Confidentiality
_____ 3. Right to appeal ineligibility
_____ 4. Appeal process
_____ 5. Right to administrative review of service dissatisfaction
_____ 6. Civil rights

IV. Client Responsibilities

_____ 1. Regarding general medical exam
_____ 2. Why exam is needed
_____ 3. What the exam consists of
_____ 4. Regarding specialist exam
_____ 5. What specialist exams are needed
_____ 6. Why specialist exams are needed
_____ 7. Explanation of forms
_____ 8. Why forms are to be signed
_____ 9. Responsibilities beyond eligibility determination
_____ 10. Specific responsibilities in relation to specific services beyond eligibility determination

V. Style

_____ 1. Communicated information at the client's level of understanding.
_____ 2. Avoided presenting too much information in "one shot."
_____ 3. Provided information in a well timed fashion.
_____ 4. Made sure client understood information provided.

Information Collection Assessment Form

Directions: The Information Collection Assessment Form includes topics which may be discussed during the initial rehabilitation counseling interview. Use the form to check the topics you hear discussed with the client during the interview.

I. Referral

_____ 1. Referral source
_____ 2. Client expectations
_____ 3. Client feelings
_____ 4. Previous contact
_____ 5. Previous services
_____ 6. Current contact with other agencies
_____ 7. Services from other agencies

II. Disability/Medical

_____ 1. Disability
_____ 2. Multiple disability?
_____ 3. Duration
_____ 4. Stability
_____ 5. Previous or current treatment
_____ 6. Employment limitations
_____ 7. Daily functioning
_____ 8. Client feelings

III. Social

_____ 1. Marital status
_____ 2. Living arrangement
_____ 3. Dependents
_____ 4. Family members' attitude
_____ 5. Support from non-family
_____ 6. Satisfaction with living arrangements
_____ 7. Satisfaction with social life
_____ 8. Leisure activities

IV. Economic

_____ 1. Primary source of support
_____ 2. Other sources of support
_____ 3. Unpaid debts
_____ 4. Additional sources of support in the future
_____ 5. Medical insurance
_____ 6. Client feelings

V. Work History

_____ 1. Most recent work
_____ 2. Weekly earnings from above
_____ 3. Length of employment from above
_____ 4. Satisfaction with work
_____ 5. Performance on job
_____ 6. Feelings associated with above
_____ 7. Reason for termination
_____ 8. 2-7 for previous employment
_____ 9. Ability to get along with supervisor(s)
_____ 10. Ability to get along with co-workers
_____ 11. Present employment status
_____ 12. Length of present status
_____ 13. Job seeking behavior

VI. Vocational Goals

_____ 1. Vocational motivation
_____ 2. Vocational objective
_____ 3. Reason for vocational objective
_____ 4. Client's perception of ability to achieve vocational objective
_____ 5. Other vocational goals
_____ 6. Long range vocational planning

VII. Education

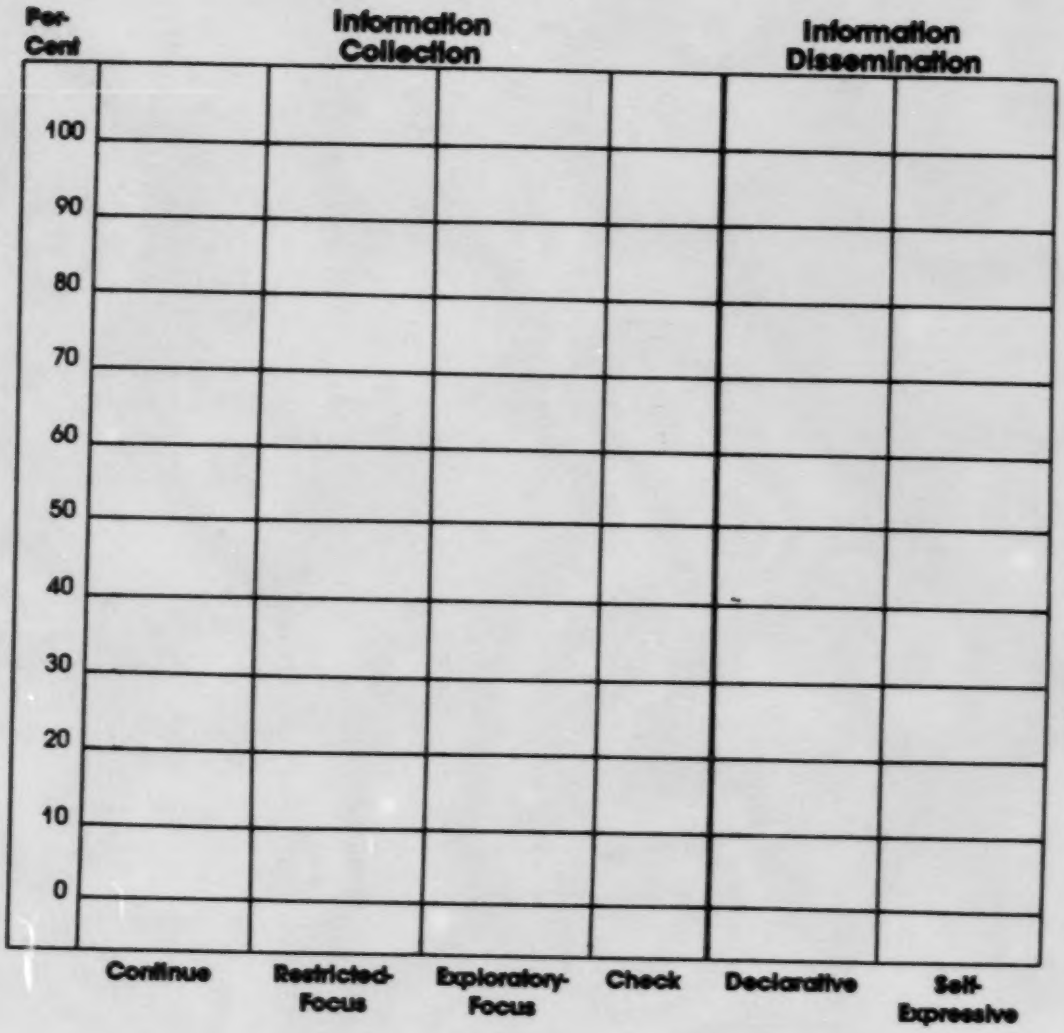
_____ 1. Highest grade completed
_____ 2. If not high school graduate, why?
_____ 3. If not high school graduate, has client passed high school equivalency exam?
_____ 4. Dislikes about school
_____ 5. Favorite subjects
_____ 6. Non-favorite subjects
_____ 7. Grades
_____ 8. Previous vocational training
_____ 9. Reaction to vocational training
_____ 10. Client feelings

Interaction Techniques Classification Form: Worksheet

Type of Response

Continue	Restricted Focus	Exploratory Focus	Check	Declarative	Self Expressive	Total	
							total
							percent

Interview Profile



Draw your profile in accordance with how you believe your profile of Interaction Techniques would look for one of your typical initial interviews.

Interaction Techniques Self-Assessment Guide
Part II - Verbal Responding

During an interview I perform the following behaviors. . .

Yes	No	N/A	
____	____	____	1. Open the interview with an open-ended question or statement that focuses on the concerns of the client.
____	____	____	2. Allow the client as many alternatives for self-expression as possible by making open-ended questions and statements, reflecting my understanding of what the person is saying; and use short verbal responses such as "uh-huh", "yes" etc. that ecourage him/her to continue talking.
____	____	____	3. Utilize freely open-ended responses, such as exploratory-focus, check, and continue responses, to build, strengthen, and maintain a positive relationship.
____	____	____	4. Avoid excessive use of responses that call for short, quick client responses that tend to curtail his/her perceptual field and elaboration of topics.
____	____	____	5. Consciously attempt to establish an early pattern of responding that facilitates client expression and predominately use the open-ended responses of exploratory-focus, check, and continue and avoid predominately using closed-ended questions.
____	____	____	6. Communicate my attentiveness, concern, and involvement by practicing the effective non-verbal techniques of positioning, observing, listening, and frequently make verbal continue responses.
____	____	____	7. Avoid the use of questions as my only tool for gathering information.
____	____	____	8. Break unproductive pauses with exploratory-focus and check responses.
____	____	____	9. Use restricted-focus responses only to collect specific bits of required information or to appropriately narrow the area of discussion.
____	____	____	10. Often communicate my understanding of what the client is saying with check responses.
____	____	____	11. Often communicate my understanding of what the client is experiencing.

Yes	No	N/A		
____	____	____	12.	Frequently verbalize what I think the client is communicating.
____	____	____	13.	Have a matter-of-fact attitude and tone of voice when giving the client objective and factual information.
____	____	____	14.	Use language the client understands and avoid jargon and confusing terminology.
____	____	____	15.	Avoid presenting too much information to the client at "one shot".
____	____	____	16.	Provide information in a well-timed fashion.
____	____	____	17.	Make sure the client understands the information I provide.
____	____	____	18.	Use supportive, self-disclosure, etc. responses when called for.
____	____	____	19.	Avoid giving inappropriate advice.
____	____	____	20.	Avoid responses that communicate low levels of respect and negative regard.

Possible Information Dissemination Topics to Discuss with Client

I. Role and Function of the Rehabilitation Agency

1. General statement about the purpose of rehabilitation.
2. Explanation of what makes a person eligible for vocational rehabilitation services.
3. Explanation that an eligibility decision must be made in client's case.
4. General statement about what the rehabilitation agency is.
5. General statement about what the rehabilitation agency is not.
6. Information on services that can be provided.
7. Information about the contribution of certain services to meeting objectives.
8. A statement about the referral process.
9. Feedback to client of any understanding of client's reaction to information about the role and function of the agency.

II. Role and Function of the Rehabilitation Counselor

1. Counselor's role as an arranger and/or coordinator of services.
2. Counselor's role as a direct provider of services.
3. Client advocacy role.
4. Role as a team member.
5. Joint approach with client.
6. Statements about what the counselor will do in specific situations.
7. Statements about what the counselor will not do in specific situations.
8. Statements about how the counselor will utilize information collected from client.
9. Statements about how the counselor will utilize information collected from external sources.
10. Feedback to client of any understanding of client's reaction to counselor's discussion of his role.

III. Client Rights

1. Statement about the importance of sharing information.
2. Statement about how information collected will be used.
3. Statement about confidentiality.
4. Explanations of client's right to appeal if found ineligible.
5. Explanation of the appeal process.
6. Explanation of client's civil rights.
7. Explanation of client assistance projects if these are available to client.
8. Feedback to client of any understanding of his reaction to counselor's discussion of client's rights.

IV. Client Responsibilities

1. Explanation of what client needs to do to get general medical exam.
2. Explanation of why the general medical exam is needed.
3. Explanation of any requested client actions related to psychological examinations.
4. Explanation of other requested client actions.
5. General statement about client responsibilities throughout rehabilitation process.
6. Statement of specific client responsibilities in relation to specific services.
7. Feedback to client of any understanding of client's reaction to information about his responsibilities.

Possible Information Collection Topics to Explore

I. Referral Information

1. Referral source.
2. Client expectations from Vocational Rehabilitation Agency.
3. Client's feelings associated with being referred or seeking vocational rehabilitation services.
4. Amount of previous contact with a state vocational rehabilitation agency.
5. Previous services received by client from a state vocational rehabilitation agency.
6. Amount of contact with other agencies or professionals.
7. Services being received by client from other agencies and professionals.

II. Disability/Medical Information

1. Disability reported by client.
2. Are there multiple disabilities?
3. Duration of disability(ies).
4. Stability of disability(ies).
5. Previous or current treatment for disability(ies).
6. Disability-caused limitations to employment.
7. In what manner and to what extent has the client's disability affected him/her in regard to non-employment related daily functioning?
8. Client's feelings associated with his disability.

III. Social Information

1. Client's marital status.
2. Client's current living arrangements.
3. Number of dependents.
4. Attitude of family members toward client seeking vocational rehabilitation services.
5. Support from non-family associates.
6. Client's satisfaction with current living arrangements.
7. Client satisfaction with social life.
8. Factors in the client's social life that might interfere or facilitate client's rehabilitation plan.
9. Client's leisure time activities.

IV. Economic Information

1. Client's primary source of support.
2. In addition to his primary source of support, does the client have other sources of support?
3. Does the client have any unpaid debts of significant size?
4. Will the client have any additional sources of income in the future?
5. Does the client have medical insurance?
6. Client's feelings associated with his economic situation.

V. Work History

1. The client's most recent work experience.
2. How much was client's weekly earning on that job?
3. Length of employment for that job.
4. Time passed since that job held.
5. How did client like the job?
6. How well did the client perform the job?
7. What are client's feelings about his most recent employment situation?
8. Reason for termination of that job.
9. Information on the majority of above pertaining to earlier jobs, or determination of no earlier jobs.
10. How well did client get along with previous work supervisor(s)?
11. How well did client get along with previous workers?
12. If the client is presently unemployed, how long?
13. Has the client sought work recently?

VI. Vocational Goals

1. Does the client want either a job or training?
2. Does the client have a specific vocational goal?
3. If yes, why is the client interested in that vocational goal?
4. How optimistic or pessimistic is the client about his ability to achieve a vocational goal?
5. Does the client have more than one potential vocational goal?
6. What does the client see himself doing vocationally, five years from now?

VII. Educational Information

1. How far did the client go in school?
2. If client did not complete his last school experience, why?
3. If client did not complete high school, has he passed a high school equivalency exam?
4. What did the client like or dislike about school?
5. What were his favorite subjects in school?
6. What subjects did the client dislike most?
7. What kind of grades did the client make?
8. Amount of previous vocational training.
9. Client's reaction to previous training.
10. Client's feelings associated with his educational experience and educational status.
11. Major factors about client's educational situation that will interfere with or facilitate his rehabilitation plan.

VIII. Miscellaneous

1. Client's perception or understanding of what has transpired during the interview.
2. Client's plans between now and next interview.

Interaction Techniques Classification Form: Worksheet

Type of Response

Continue	Restricted Focus	Exploratory Focus	Check	Declarative	Self Expressive	Total	
							total
							percent

Interaction Techniques Self-Assessment Guide

Part I - Non-Verbal Behavior Check List

During the interview just completed, I performed the following behaviors. . .

Yes	No	N/A	
_____	_____	_____	1. Put aside what I was doing and gave the person my full attention.
_____	_____	_____	2. Established a proper and comfortable distance between me and the interviewee.
_____	_____	_____	3. Faced the person squarely. Right shoulder opposite the person's left shoulder and left shoulder opposite the person's right.
_____	_____	_____	4. Leaned or rotated my body toward the person.
_____	_____	_____	5. Developed and maintained eye contact.
_____	_____	_____	6. Assumed and maintained an "open" posture by avoiding crossing my legs, folding my arms, etc.
_____	_____	_____	7. Maintained a relaxed manner while avoiding rigid posture.
_____	_____	_____	8. Refrained from making distracting movements such as fidgeting.
_____	_____	_____	9. Looked at the interviewee's positioning.
_____	_____	_____	10. Looked at the interviewee's grooming.
_____	_____	_____	11. Looked at the interviewee's level of activity.
_____	_____	_____	12. Looked at the interviewee's facial expressions.
_____	_____	_____	13. Looked for feelings expressed by the interviewee.
_____	_____	_____	14. Looked for patterns in the person's non-verbal communication.
_____	_____	_____	15. Developed hypotheses based on my observations to be checked out with the interviewee.
_____	_____	_____	16. Resisted internal distractions. I listened with a clear and open mind and did not think about extraneous things.
_____	_____	_____	17. Initially suspended judgement.
_____	_____	_____	18. Had goals for listening. I knew exactly what I was listening for.
_____	_____	_____	19. Listened to the actual words of the person that described the situation he/she was talking about; what he/she actually saw, heard, sensed, etc.
_____	_____	_____	20. Listened for a description of what the person said to him/herself about the situation.
_____	_____	_____	21. Listened for the way the person felt.
_____	_____	_____	22. Listened for the person's description of his/her behavioral actions in the situation; what overt action he/she actually did or did not perform.
_____	_____	_____	23. Listened for the person's motives or intentions in the situation.
_____	_____	_____	24. Listened for the person's major area of concern.
_____	_____	_____	25. Listened for common themes expressed by the person.

Yes	No	N/A	
_____	_____	_____	26. Listened to the person's tone of voice; volume, intensity, rapidity, etc.
_____	_____	_____	27. Listened for any inconsistencies in the person's communication.
_____	_____	_____	28. Communicated my attentiveness with varied facial expressions, smiling, nodding head, hand gestures, etc.
_____	_____	_____	29. Waited before responding verbally. During this "wait period" I systematically labeled, organized and described to myself what I had observed and heard. For example, I described in my own mind, the event the person was talking about, what he/she said to him/herself about that event, any feelings experienced, and the overt actions performed by the person while focusing on the person's major area of concern.
_____	_____	_____	30. I thought about the verbal response to make to the person and chose the most facilitative one that would best help me achieve my objectives for the interview.

Interaction Techniques Self-Assessment Guide

Part II - Verbal Responding Check List

During the interview just completed, I performed the following behaviors. . .

Yes	No	N/A	
_____	_____	_____	1. Opened the interview with an open-ended question or statement that focused on the concerns of the interviewee.
_____	_____	_____	2. Allowed the person as many alternatives for self-expression as possible by making open-ended questions and statements, reflecting my understanding of what he/she was saying, and used short verbal responses such as "uh-huh", "yes", etc. that encouraged person to continue talking.
_____	_____	_____	3. Utilized freely open-ended responses, such as exploratory-focus, check, and continue responses, to build, strengthen, and maintain a positive relationship.
_____	_____	_____	4. Avoided excessive use of responses that called for short, quick interviewee responses that tend to curtail his/her perceptual field and elaboration of topics.
_____	_____	_____	5. Consciously attempted to establish an early pattern of responding that facilitated interviewee expression and predominately used the open-ended responses of exploratory-focus, check, and continue and avoided predominately using closed-ended responses.
_____	_____	_____	6. Communicated my attentiveness, concern, and involvement by practicing the effective non-verbal techniques of positioning, observing, listening, and frequently made verbal continue responses.
_____	_____	_____	7. Avoided the use of questions as my only tool for gathering information.
_____	_____	_____	8. Broke unproductive pauses with exploratory-focus and check responses.
_____	_____	_____	9. Used restricted-focus responses only to collect specific bits of required information or to appropriately narrow the area of discussion.
_____	_____	_____	10. Often communicated my understanding of what the person was saying with check responses.
_____	_____	_____	11. Often communicated my understanding of what the person was experiencing.
_____	_____	_____	12. Frequently verbalized what I thought the person was communicating.
_____	_____	_____	13. Had a matter-of-fact attitude and tone of voice when giving the person objective and factual information.
_____	_____	_____	14. Used language the person understood and avoided jargon and confusing terminology.

Yes	No	N/A	
____	____	____	15. Avoided presenting too much information to the person at "one shot".
____	____	____	16. Provided information in a well timed fashion.
____	____	____	17. Made sure the interviewee understood the information I provided.
____	____	____	18. Used supportive, self-disclosure, etc. responses when called for.
____	____	____	19. Avoided giving inappropriate advice.
____	____	____	20. Avoided responses that communicated low levels of respect and negative regard.

Information Dissemination Assessment Form

In Categories I - IV, check the topics that were discussed with the client during the just completed interview. In Category V, check each behavior that described the manner in which information was disseminated.

I. Role & Function of the Rehabilitation Agency

_____ 1. Purpose of agency
_____ 2. What the agency is not
_____ 3. Eligibility criteria
_____ 4. Fact that an eligibility decision will be made
_____ 5. Services provided
_____ 6. Objectives of certain services
_____ 7. Why the person was referred

II. Role & Function of the Rehabilitation Counselor

_____ 1. Arranger of services
_____ 2. Provider of services
_____ 3. Client advocate
_____ 4. Team member
_____ 5. Joint approach with client
_____ 6. Actions in specific situations
_____ 7. Lack of action in specific situations
_____ 8. Interview information utilization
_____ 9. External information utilization

III. Client Rights

_____ 1. Objectives of interview
_____ 2. Confidentiality
_____ 3. Right to appeal ineligibility
_____ 4. Appeal process
_____ 5. Right to administrative review of service dissatisfaction
_____ 6. Civil rights

IV. Client Responsibilities

_____ 1. Regarding general medical exam
_____ 2. Why exam is needed
_____ 3. What the exam consists of
_____ 4. Regarding specialist exam
_____ 5. What specialist exams are needed
_____ 6. Why specialist exams are needed
_____ 7. Explanation of forms
_____ 8. Why forms are to be signed
_____ 9. Responsibilities beyond eligibility determination
_____ 10. Specific responsibilities in relation to specific services beyond eligibility determination

V. Style

_____ 1. Communicated information at the client's level of understanding.
_____ 2. Avoided presenting too much information in "one shot."
_____ 3. Provided information in a well timed fashion.
_____ 4. Made sure client understood information provided.

Information Collection Assessment Form

Check the topics that were discussed with the client in the just completed interview.

I. Referral

_____ 1. Referral source
_____ 2. Client expectations
_____ 3. Client feelings
_____ 4. Previous contact
_____ 5. Previous services
_____ 6. Current contact with other agencies
_____ 7. Services from other agencies

II. Disability/Medical

_____ 1. Disability
_____ 2. Multiple disability?
_____ 3. Duration
_____ 4. Stability
_____ 5. Previous or current treatment
_____ 6. Employment limitations
_____ 7. Daily functioning
_____ 8. Client feelings

III. Social

_____ 1. Marital status
_____ 2. Living arrangement
_____ 3. Dependents
_____ 4. Family members' attitude
_____ 5. Support from non-family
_____ 6. Satisfaction with living arrangements
_____ 7. Satisfaction with social life
_____ 8. Leisure activities

IV. Economic

_____ 1. Primary source of support
_____ 2. Other sources of support
_____ 3. Unpaid debts
_____ 4. Additional sources of support in the future
_____ 5. Medical insurance
_____ 6. Client feelings

V. Work History

_____ 1. Most recent work
_____ 2. Weekly earnings from above
_____ 3. Length of employment from above
_____ 4. Satisfaction with work
_____ 5. Performance on job
_____ 6. Feelings associated with above
_____ 7. Reason for termination
_____ 8. 2-7 for previous employment
_____ 9. Ability to get along with supervisor(s)
_____ 10. Ability to get along with co-workers
_____ 11. Present employment status
_____ 12. Length of present status
_____ 13. Job seeking behavior

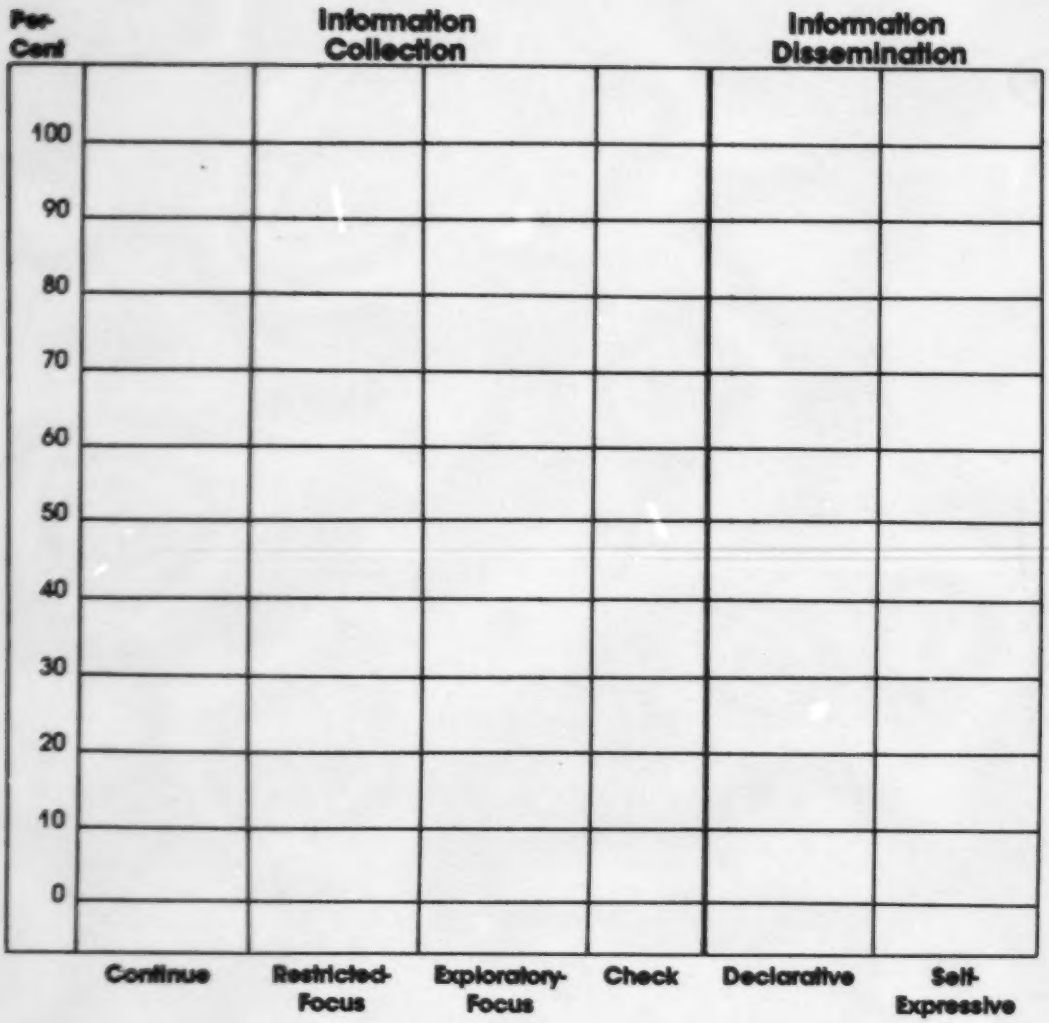
VI. Vocational Goals

_____ 1. Vocational motivation
_____ 2. Vocational objective
_____ 3. Reason for vocational objective
_____ 4. Client's perception of ability to achieve vocational objective
_____ 5. Other vocational goals
_____ 6. Long range vocational planning

VII. Education

_____ 1. Highest grade completed
_____ 2. If not high school graduate, why?
_____ 3. If not high school graduate, has client passed high school equivalency exam?
_____ 4. Dislikes about school
_____ 5. Favorite subjects
_____ 6. Non-favorite subjects
_____ 7. Grades
_____ 8. Previous vocational training
_____ 9. Reaction to vocational training
_____ 10. Client feelings

Interview Profile

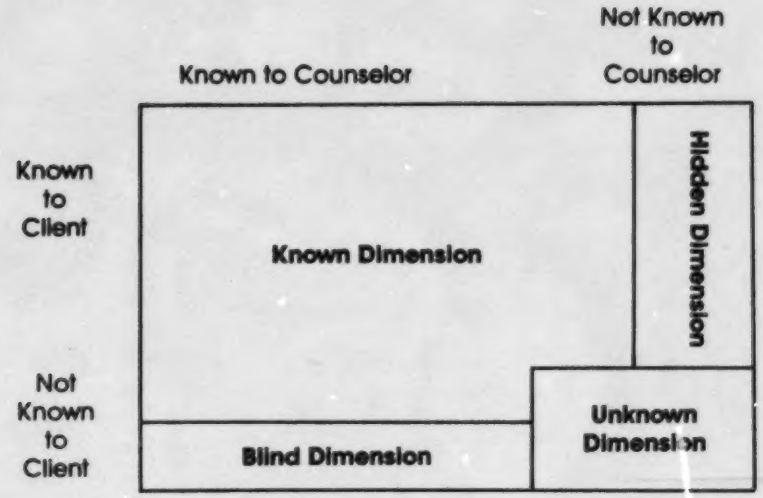


My Interview Profile in a Role-Played Initial Interview
Date:

Systematic Interview Programming Format

1. What are my objectives for this interview?
2. What information does the client need from me to achieve those objectives?
   a. Specific topics developed in Section III.
   b. Knowledge of my attitude that demonstrates respect, positive regard, concern, attentiveness, involvement, etc.
3. What information do I need from the client to achieve those objectives?
   a. Specific topics developed in Section IV.
   b. Knowledge of interviewee's attitude and involvement.
4. What is the most effective and efficient way to exchange that information?
   a. Attract the client in a facilitative manner so that he/she comes to the interview with a positive attitude.
   b. Carry out all the guidelines for effective planning.
   c. Structure the interview setting making it conducive to the exchange of information.
   d. When disseminating information attend to language level used, amount of information in one shot, timing, and interviewee's comprehension of the information.
   e. When collecting information, be selective, avoid a facts with minimum meaning approach, be systematic, and use questions in moderation.
   f. Practice effective positioning, observing, and listening.
   g. Utilize a facilitative response style by making moment-to-moment responses in a manner that encourages free expression, openness, topic elaboration, etc.

Relevant Information Awareness Matrix



The Rehabilitation Intake Interview

The Skills

I. Systematic Interview Programming

A. Attracting the Client

1. Mode of Communication
2. To Whom
3. Who the interview is with
4. What will happen
5. Where the interview is
6. How to get there
7. When the interview is
8. Why or purpose of the interview
9. Personal reason to come
10. Follow-up

B. Planning the Interview

1. General "Game Plan"
2. Systematic Format
3. Content and Process
4. Specific objectives
5. Written Plan
6. Review
7. Inform Client
8. Moment-to-Moment Objectives
9. Client Focus vs Form Focus
10. Flexible

C. Structuring the Interview Setting

1. Barriers
2. Chairs
3. Client Comfort
4. Distracting Variables
5. Confidentiality
6. Neatness
7. Temperature
8. Lighting
9. Accessibility
10. Time

II. Information Exchange

A. Information Dissemination Effectiveness

1. Role and Function of Agency
2. Role and Function of Counselor
3. Client Rights
4. Client Responsibilities
5. Counselor Style
   - Language used
   - Amount of information
   - Timing
   - Format

B. Information Collection Effectiveness

1. Referral
2. Disability/Medical
3. Social
4. Economic
5. Work History
6. Vocational Goals
7. Education
8. Counselor Style
   - Systematic
   - Selective
   - Shot-gun
   - Open-ended

III. Non-Verbal Interaction Techniques

A. Positioning

1. Attention
2. Distance
3. Face squarely
4. Body inclination
5. Eye-contact
6. Open-posture
7. Relaxed
8. Distracting movements

B. Observing

1. Client's positioning
2. Personal appearance
3. Levels of activity
4. Gestures
5. Facial expressions
6. Feelings
7. Patterns

C. Listening

1. Internal distractions
2. Suspend judgement
3. Goals
4. Actual words
5. Self-talk
6. Feelings
7. Actions
8. Area of concern
9. Themes
10. Tone of voice
11. Inconsistencies
12. Attentiveness
13. Wait

IV. Verbal Responding

A. Moment-to-Moment Responses

1. Continue Response
2. Restricted-Focus Response
3. Exploratory-Focus Response
4. Check Response
5. Declarative Response
6. Self-Expressive Response

B. Response Styles

1. The Listener
2. The Interrogator
3. The Explorer
4. The Reflector
5. The Informer
6. The Self-Expresser

The Facilitator

1. Open the interview
2. Gather information from client's perspective
3. Break unproductive pauses
4. Build and maintain rapport
5. Gather additional information
6. Facilitate client exploration
7. Gather specific bits of information
8. Narrow the area of conversation
9. Encourage client talk without interruptions
10. Communicate understanding
11. Present objective factual information
12. Information from one's own frame of reference

Recommended Readings

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